Project Assessment and Reporting System (PARS)

User Manual
version 3.03

September, 2004

United States Department of Energy
Office of Management, Budget, and Evaluation (OMBE)
Office of Engineering and Construction Management (OECM)

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Introduction

The purpose of PARS is to deliver project status and assessment information to Department Of Energy (DOE) senior managers and key program stakeholders.

What is PARS?

PARS stands for Project Assessment and Reporting System. It is part of the DOE's project reform initiative that was launched in June 1999. A key requirement for this initiative is a directive that the Office of Management, Budget and Evaluation (OMBE) establish a project management tracking and control system. PARS is specifically designed to fulfill this requirement. Since September 2000, Project Performance Corporation has been working closely with the Office of Engineering and Construction Management (OECM) to develop this system.

PARS History

PARS was first brought online in July of 2001. A memorandum dated September 19, 2001 issued by the Deputy Secretary of the Department of Energy, required that the Director of the OMBE provide information on the input and update of project information in PARS. By October 30, 2001, all Major Systems had been entered and were being updated using the PARS database. This was expanded to all non-major systems by December 31, 2001.

In January of 2003, PARS Version 3.0 was first introduced. This version of PARS includes many updates, enhancements, and improvements from the previous version. These improvements include: new navigation menus that allow users to navigate anywhere in the application with a few mouse-clicks; expanded context-sensitive help with dictionary definitions for all field and table names; edit screens for streamlined data entry; web page helpful hints that assist users navigating through the system; a system of data validation, informing users of errors upon saving their data; an expanded data model with new tables and fields; an expanded and simplified narrative; a complete make-over of the query wizard (report generator) that allows users to create more robust reports; enhanced security; and numerous application performance improvements.

September 2004 brought an enhanced update of PARS 3.0, which builds upon the improvements of the previous version. Based on user suggestions and collaboration with OECM, the new improvements in PARS 3.0 augment the functionality of the system and ease the user's experience. Major enhancements in the PARS 3.0 system include: an updated data model with new tables and fields; a query prompting feature to select specific criteria before running a particular query; data validation that immediately warns users of incorrectly typed data prior to saving; and an interactive and printable graphing function.

Web-Enabled Distributed Database

PARS is a web-enabled distributed database. Anyone who has been granted access (contact your Site Administrator/Program Administrator or the OECM Representative for access permission) can use the system with nothing more than an Internet connection and a browser (see System Requirements for more details). Federal Project Directors (or their appointed designee) enter monthly progress data on all projects under their cognizance. This data is maintained in a centralized database for the purpose of progress reporting. Senior executives at headquarters or in the field can run reports to assess progress on projects. With this tool, the department has a common structure for reporting the current status of all acquisition programs that is timely, accurate, complete and reliable.

Reporting System

In creating PARS, the premier design consideration is its reporting capabilities. PARS has been designed so that the user can view, create, change, save, and share reports. The report generator offers the flexibility to filter, sort, group, sum, graph, and modify column properties. PARS provides a set of built-in standard reports available to all users, shared reports that are created by users and shared with members of the user community, and personal reports that can be customized and saved for easy retrieval. There are also pre-formatted customized reports, such as the Quad Report, that are specifically designed to present consolidated project data in a prescribed format.

Assessment System

The powerful reporting capabilities of PARS enable users to quickly assess the status of ongoing projects and programs. Data can be presented in either a conventional tabular format or graphically. These capabilities facilitate the rapid assessment of trends and developments on projects or in programs. The database also provides text fields for project managers to type in narratives explaining reported cost, schedule, or other progress variances.

The project assessment system is based on Earned Value Management System (EVMS) standards. All EVMS calculations conform to the ANSI ANS/EIA 748 standards, supplemented with additional acquisition metrics required by the department. Federal Project Directors (or their appointed designee) are responsible for entering monthly Earned Value (EV) data at the very highest summary level for their projects. The EVMS provides cost and schedule performance metrics that report progress against an integrated baseline. These metrics are effective summary level project measurements that senior executives can use to assess current project and program status.

About the User Manual

This manual is your comprehensive guide to working with PARS 3.0.

<u>Typographical Conventions</u>

You will note that the manual includes special keywords set off from the rest of the text by special characters or formatting. The manual uses the following conventions to distinguish among the various menus, selections, and buttons that appear throughout the application:

- ***Menu Name*** – These include the Navigation Bar (***Home Menu***, ***Create Menu***, ***Queries Menu***, and ***Help Menu***), ***Record Menu***, ***Query Menu***, ***Column Menu***, and ***Field Menu***.
- *Menu Selection* – These include all items that are contained in the above-mentioned menus.
- <Button> - These include all actions that required the clicking of a button on the screen such as <Save>.

Accessing PARS

PARS is a password protected online database. You must register and have your account approved before gaining access to the database.

PARS Administration

You must have a valid user name and password to access PARS. User names, passwords, and their applicable rights are assigned and distributed by the Technical Support Desk at Project Performance Corporation in conjunction with your local Site Administrator or Program Administrator.

A PARS support line has been established for questions on any aspect of the PARS system and is available via email (parshelp@ppc.com) or phone (703-748-7022). See the Contact Us section for more information.

System Requirements

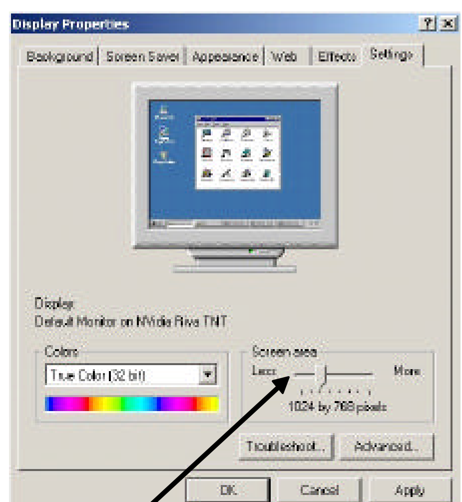
To run PARS, you will need Internet access and Microsoft Internet Explorer (IE) versions 5.5 or higher. At this time, the application has only been tested for compatibility with IE v5.5 or higher. We cannot guarantee that it is compatible with Netscape browsers. You may lose some functionality when using Netscape.

PARS has not been designed or tested with Apple computers or Macintosh operating systems.

If you are using Windows NT, Windows 2000, or Windows XP operating systems, you will need administrator privileges for your PC to load ChartFX, a self-loading graphics plug-in. If you do not have administrator privileges to load software on your PC, call your local computer support help desk and request their assistance. The system will function without the plug-in, however, you will not be able to view or print charts and graphs.

Preferred Settings

We recommend that you use Microsoft Internet Explorer (versions 5.5 or higher) to view the web site. Use of other browsers or lower versions of Internet Explorer will limit the display and functionality of the website. We also advise you to temporarily change your browser settings. PARS is best viewed in the "full-screen" mode which can be selected by pressing the <F11> button on the top of the keyboard, or by selecting the *Full View* option under the View heading on the browser. To restore your browser to the previous display mode, press the <F11> button again. This function, combined with the screen resolution described below, will minimize the need to scroll down pages when viewing information and entering data on PARS pages. We also recommend that you set your monitor to a 1024 x 768 pixel resolution to fully enhance the graphical display of PARS records.



Slider to adjust screen area resolution

Take the following steps to reset your screen resolution:

1. Click <Start>, and select *Settings* and then *Control Panel.*
2. Click the <Display> icon.
3. Go to the "Settings" tab and find "Screen Area."
4. Move the sliding bar until you have found the appropriate resolution, (1024 x 748).

Registration

To obtain an account with PARS, you must register with your local PARS Site or Program Administrator.

To request an account, you must complete an online registration form. Upon completion of this form, an email will be automatically sent to your administrator, informing him/her of your request and prompting him/her to approve your user account.

<u>New Users</u>

If you are not a Site or Program Administrator and would like to establish a user account using the online registration form, take the following steps:

1. From the PARS logon page (https://pars.energy.gov), click on the link that says, "Click here if you do not have an account." You will then come to a new page that instructs you to complete an online registration form.

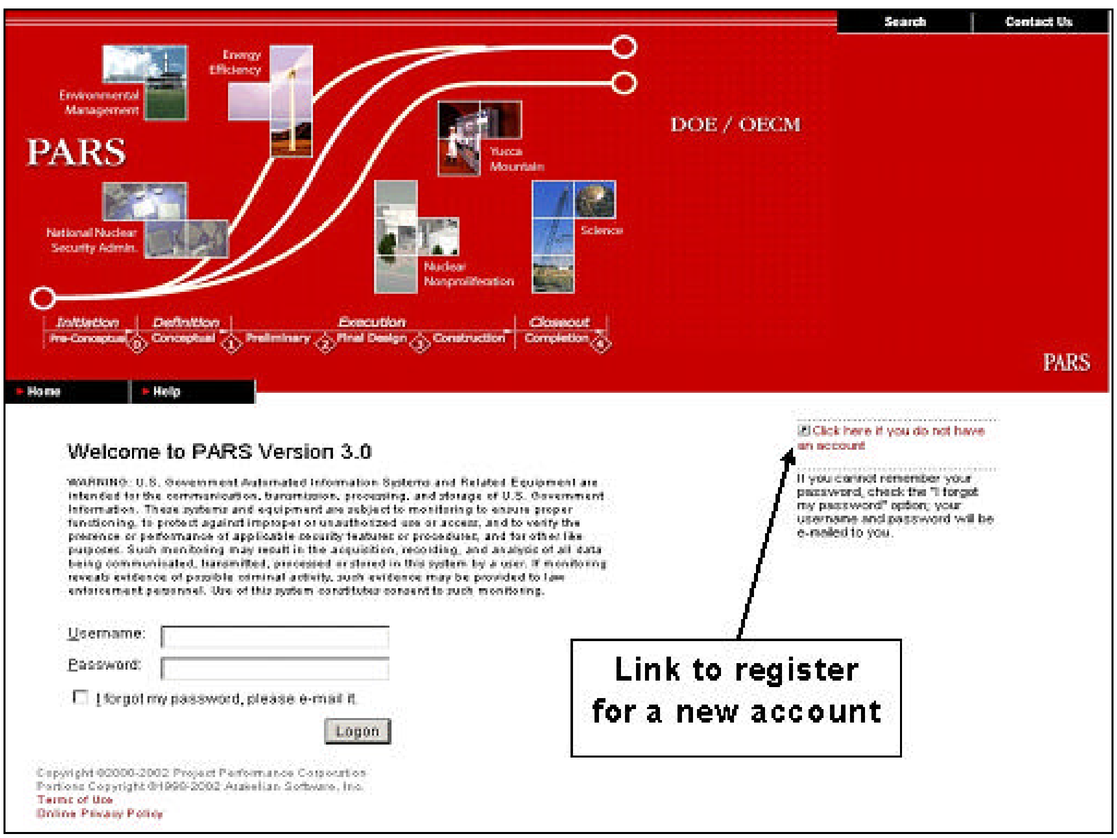


Figure 1: Register for a New Account

2. Fill out the user registration form containing your personal information. Required fields include: your desired username, name, organization, phone number and email address.

3. Select your administrator's email address from the drop down list. The user that you select is the individual that will be required to approve your account.

4. Click <Submit> to send your request to your PARS Administrator. An email confirming that your request has been submitted will be sent to you immediately. Within 48 hours, you should be notified in a second email that your account has been established. If you have not been notified within this time period, please contact either the administrator that you have selected or the PARS technical support desk.

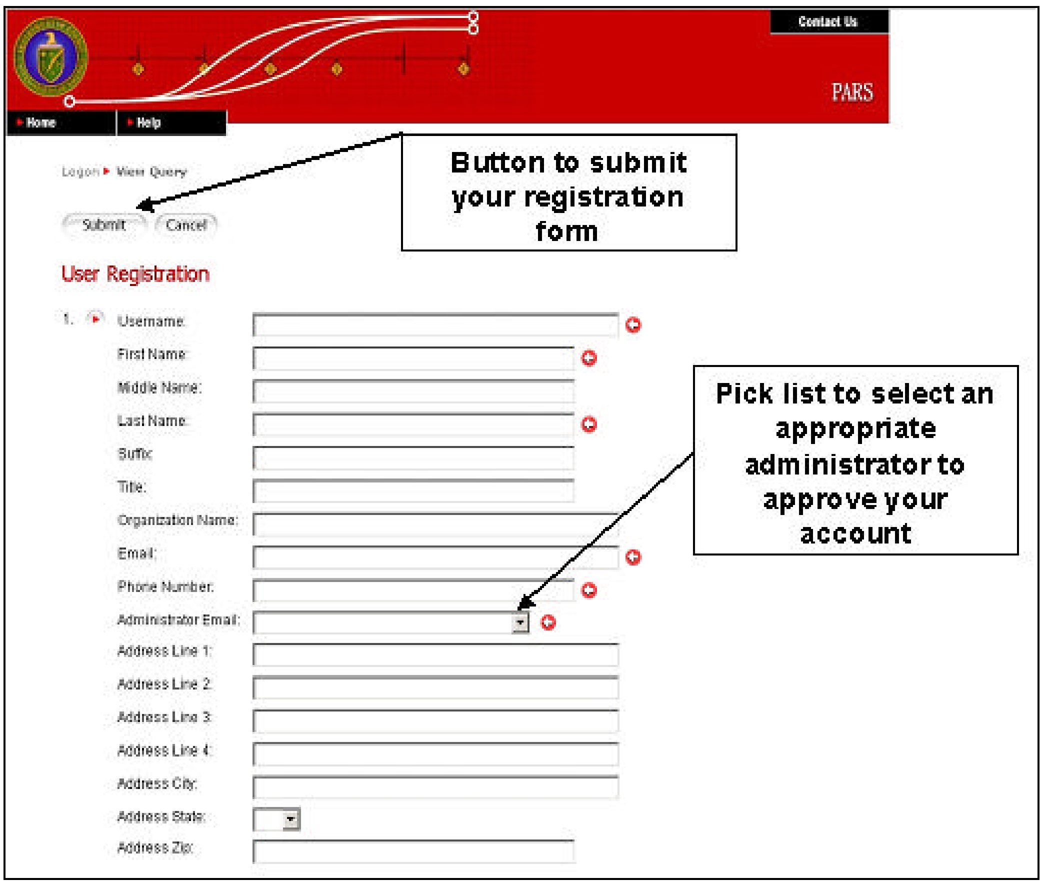


Figure 2: User Registration Screen

<u>Site or Program Administrators</u>

If you are a Site or Program Administrator and you do not have an account with PARS, please contact the PARS support desk at (703) 748-7022 or parshelp@ppc.com to request an account. Administrator accounts cannot be created using the PARS registration page. Please see the Contact Us section for more details.

When a user requests an account with you as his or her administrator, you will be notified with an email. In the memorandum from the Office of Management, Budget and Evaluation (OMBE) dated September 26, 2001; Administrators are instructed to only approve requests for users located at the same site or within the same program. To approve the user, navigate to the PARS website (https://pars.energy.gov) and take the following steps:

1. Logon to PARS using your own email and password. If you do not yet have an account on PARS, please contact the Help Desk at (703) 748-7022, or simply reply to this email message.
2. In the “Inbox” section of the Start Page, click on the hyperlink text “User Registration” in your Inbox. If you cannot see the text, first click on the heading “Inbox” to expand the contents.
3. New user requests will be listed in your Inbox in a table titled “User Registration.”
4. Mouse over the button marked by a red triangle in a circle. A menu will appear with an entry labeled “User Registration.” Move your mouse to the right to further expand this menu. On the large pull-down menu, mouse over the selection labeled “Edit” and left-click.
5. You must now assign the user to the appropriate DOE managing programs and sites. Select a DOE Managing Office Code(s) and Site Name(s). When you are finished, click the <Save> button.
6. Select the appropriate Group Name (“PARS Site Administrator,” “PARS Program Administrator,” “PARS Site Manager,” “PARS Program Manager,” “PARS Project Manager,” “PARS Data Entry,” or “PARS Read Only”). The Group Name will confer specific rights and permissions to the new user. Choose the group that best matches the user level of responsibility. Refer to the Rights and Permissions section of the user manual for further information. When you are finished, click the <Save/Done> button. This will both save and validate the user registration data.
7. Correct any validation errors by returning to the Edit mode as explained in step 4 above. Click <Save/Done> when finished.
8. Approve the new user by Accepting the data (this step is similar to step 4). Mouse over the button marked by a red triangle in a circle. A menu will appear with an entry labeled “User Registration.” Move your mouse to the right to further expand this menu. On the large pull-down menu, mouse over the selection labeled “Accept changes” and left-click. If all the validation errors were corrected in step 7, you will have completed the process; otherwise, you will receive an error message advising you which field needs to be corrected.

Repeat step 7 to correct any errors.

You may approve additional users by going back to step 3 above. Please approve as many users as possible to close out all open requests.

After DOE Project Directors or Program Managers are approved (by selecting “Accept changes” from the record menu), they must be assigned to their projects so that they can commit their project data to the database. You must affiliate the user with his/her respective project by creating a Contact Record, shown in Figure 3. The procedure below describes how a contact record is created.

Figure 3: Add a Contact

1. Place your mouse over the ***Create Menu*** and select *Contacts* from anywhere within the application.
2. Fill in the required information in the form provided. Be sure that the individual's email address is correct, as this is the field that will tie the user to his or her project. There is a drop-down list of all email addresses to aid you in this process.
3. When all fields are complete, you may click either the <Save> or the <Save/Done> buttons to save this information. You will now see an entry in your inbox called, "Contacts." This record has not been committed to the database at this time, and the user will still not have access to his or her project.
4. To commit this data to the database, place your mouse over the red triangle icon to pull up the ***Record Menu***.
5. Select *Accept changes* from this menu to commit the record to the database.

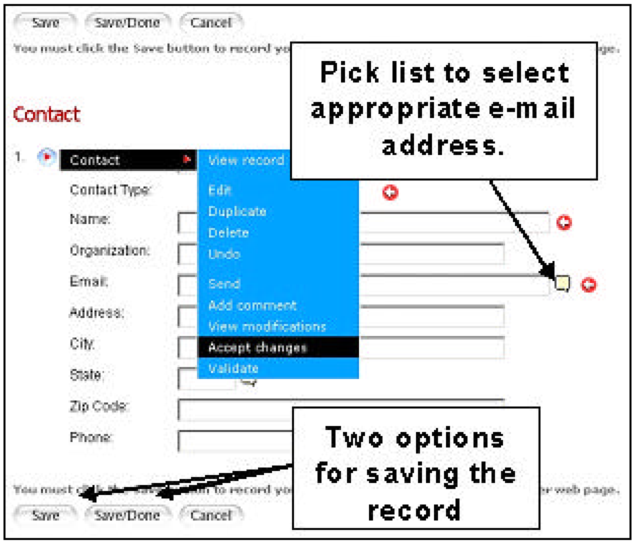


Figure 4: Create Contact Screen

You do not need to associate members of the Data Entry or Read Only groups with specific projects.

Data entry can be delegated to an individual in your office assigned to the Data Entry group; however, the system requires that a user assigned to the Site Administrator or Program Administrator group review and accept changes to the contact list in order to commit them to the database.

Logging In

The following instructions are based on these assumptions:

- You have an Internet connection;
- You are accessing the PARS site using a compatible browser, i.e., Internet Explorer (versions 5.5 or higher); and
- You have a general understanding of the Internet and basic computer applications (consult your system documentation for details).

To access PARS, take the following steps:

1. Open your Internet Browser, in accordance with the browser's instructions.
2. Enter the URL address below into the address field of your Internet Browser and then press enter: https://pars.energy.gov
3. To logon to the system, enter your username and password that you have created and click the <Logon> button.

For first-time users, or if you have forgotten your password, you may create a password for yourself by taking the following steps:

1. Enter your username only (leaving the password field blank).
2. Check the box that reads, "I forgot my password, please email it" and click the <Logon> button.
3. Within two minutes, you will receive an email containing a link to a page where you may create a new password. If your email provider allows such functions, you can simply click on this link to open a page where you can create a new password. If the email does not appear with a hyperlink, you will be required to "cut and paste" the URL into a new web browser window. From here, you will be able to create a new password for your account. Please note: this feature will not work if an account has not been created for you.

If either your email address (user name) or password submitted is not valid, PARS will reject the logon attempt and return you to the original logon screen. If you incorrectly enter your password five consecutive times, then your account will be locked out for a period of one hour. You will be required to wait an hour before you will be allowed to logon again or change your password.

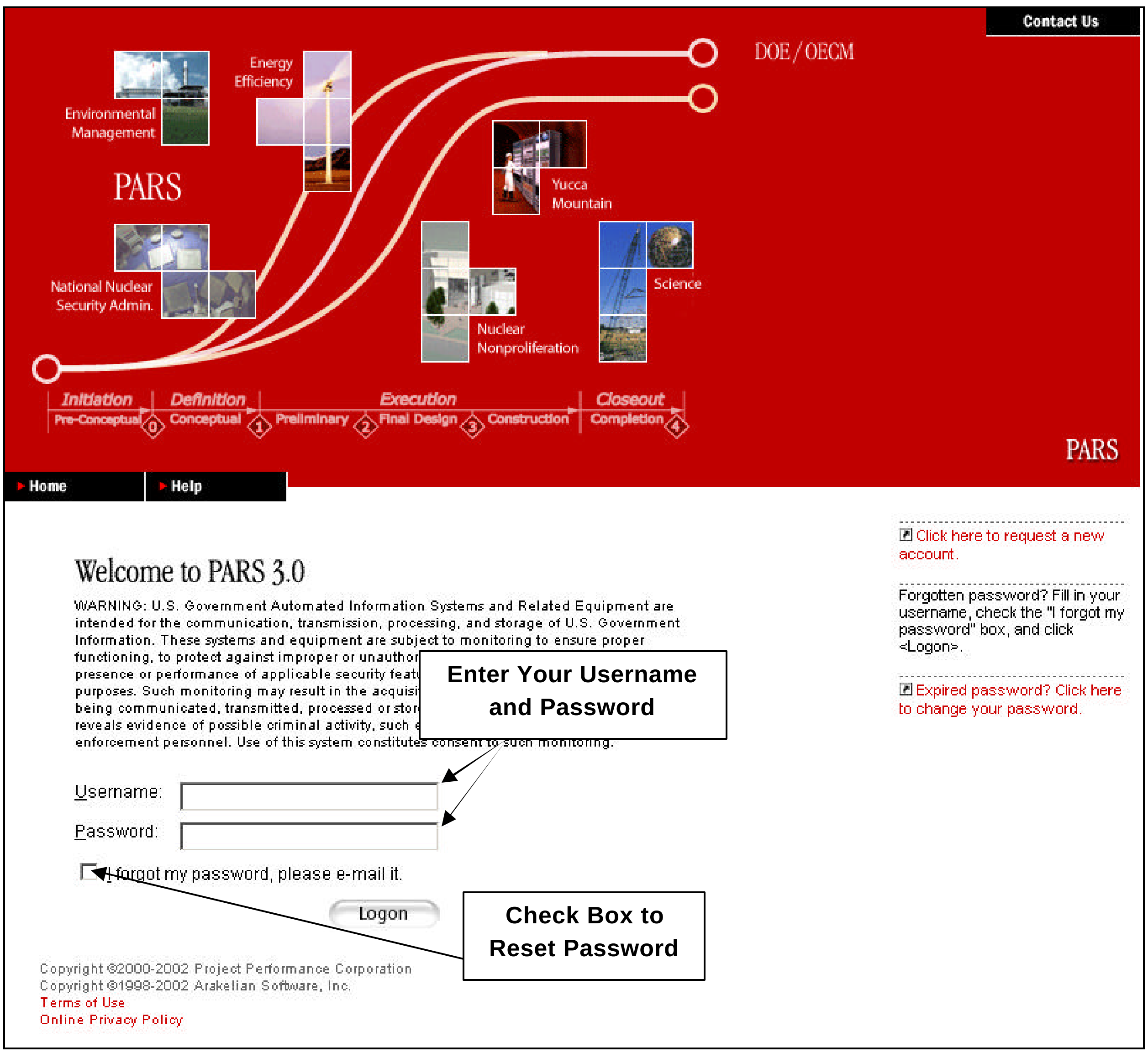
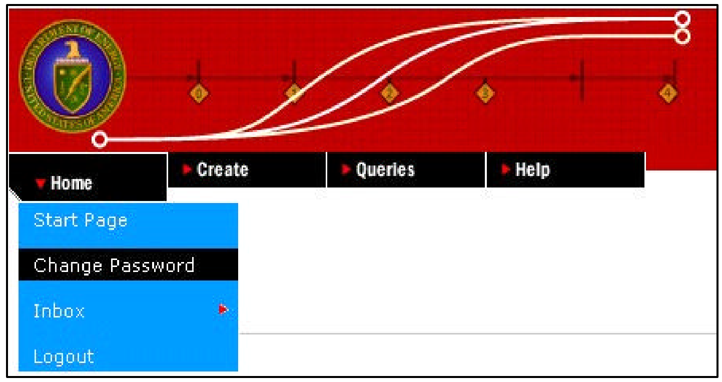


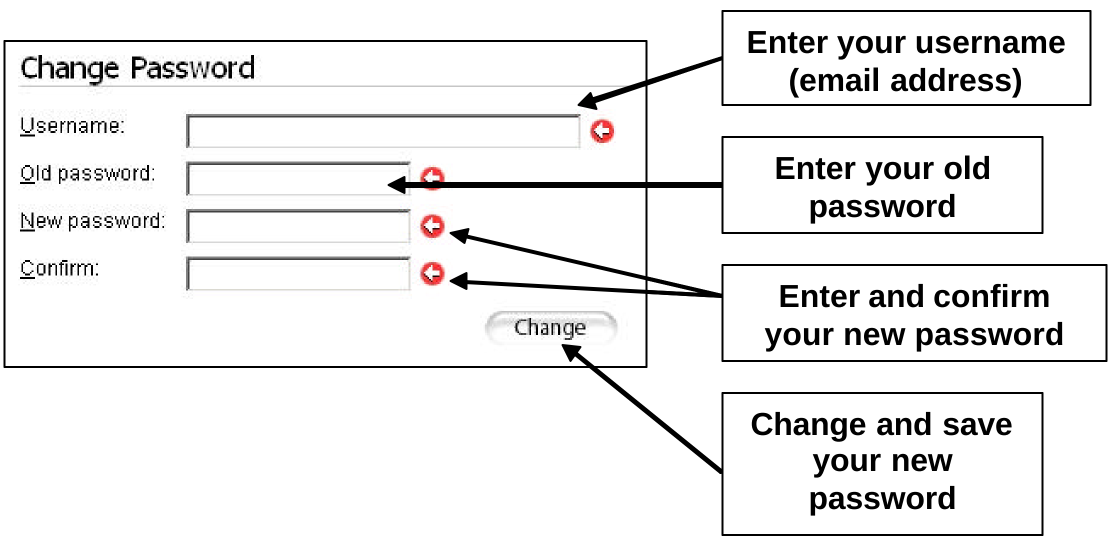
Figure 5: PARS Logon

Changing Your Password

After registering for an account on PARS and having established a password, you have the ability to change your initial password. To change your password, take the following steps:



1. Place your mouse over the ***Home Menu*** on the navigation bar and select *Change Password*. This can be done before logging in from the PARS logon page or from anywhere within the application.
2. You will see a form with four text boxes. Enter your username (often your email address) and the password that you have been provided. You may then enter a new password of your choosing.[1] The new password must be at least 8 characters long, and incorporate at least one letter, number and special character. It may not contain simple sequences of letters, numbers, or punctuation such as "123" or "abc" which are at least 3 characters long. It may also not contain any common English words or abbreviations that are at least 4 characters long. Retype the password to prevent any errors.
3. Click the <Change> button to change and save your new password.



An e-mail confirming the fact that you changed your password will be sent to you automatically.

PARS should be utilized in a guarded manner, do not share passwords or leave passwords in plain view. We also advise you to log out whenever you leave your computer workstation.

[1] Passwords in PARS 3.0 comply with applicable orders. Specifically, N 205.3 Password Generation, Protection, and Use; and G 305.3-1 Password Guide.

Logging Out

To log out of PARS, take the following steps:

1. Save all work from your current session.
2. Click Logout in the upper right corner of the screen. This will return you to the Logon screen.
3. You can now close your browser or navigate to another URL.

You can also logout of PARS by selecting *Logout* from the ***Home Menu***.

You should always log out of PARS after completing your session or whenever you leave your computer workstation. The application will automatically log you out after 20 minutes of inactivity.

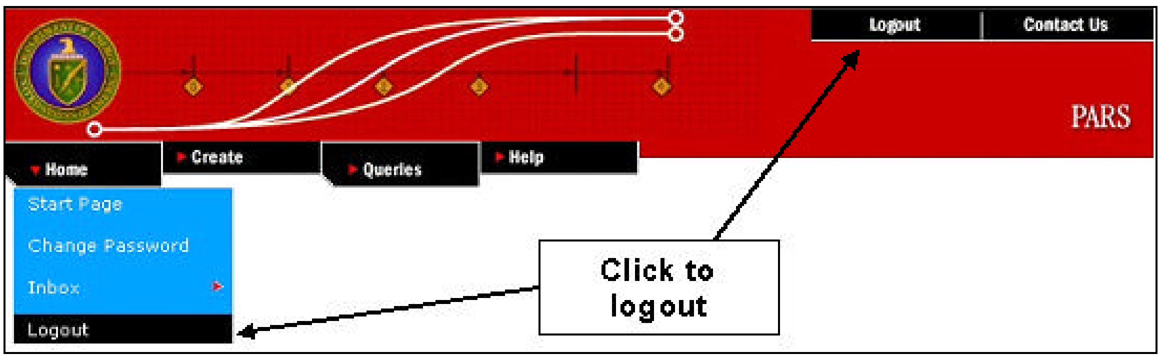


Figure 6: Logout of PARS

Navigating PARS

PARS has a built-in navigation system that works within your web browser to navigate the site. This navigation system compliments that of your web browser.

User Interface Design Conventions

The Internet is a worldwide system of computer networks that allow users at any computer, assuming permission is granted, to obtain information from any other computer. The most widely used part of the Internet is called the World Wide Web (WWW or "the Web"). All web sites have addresses called Uniform Resource Locators (URLs). When entered into the address field of a browser, URLs provide access to a web site.

Hypertext is a standard convention used to cross-reference different sites and the information contained on each of those sites. Hypertext words or phrases appear on the screen in a different color (normally blue) than the rest of the text and are often underlined. Selecting this hypertext will link or transfer you to another Web site or page. Links are also displayed as "clickable" buttons, images, or portions of images. When using a mouse, the pointer will change form when placed over a hypertext word, phrase, or image. The "hand" indicates a link to transfer you to another location.

Your Internet browser has a built-in navigation system. The features within this system will augment and aid your use of PARS. Several of the browser's features are built right into PARS, for ease of navigation, but you will need to become familiar with your browser's tools. Below is a list of standard navigation tools.

Button	Description
Back	This takes you back to the previously viewed page. However, we recommend that you use the <Back> button on the PARS navigation bar that will serve this purpose within PARS.
Forward	This takes you to the next page in order of pages viewed. (This key is not active unless the <Back> key has been used to view previous pages).
Refresh	Enables you to retrieve a new copy or the latest version/update for the web page currently visible on a user's Internet browser. Reloads updates on any edited information since the URL was first entered. This is an important feature for PARS. It should be used after generating reports and editing them with different or additional filters to update the generated report.
Home	Clicking on this key will take you back to your default homepage that you see upon initially entering the Web. This homepage is the initial page that you view upon opening your browser, and acts as the opening to the Internet. This differs from the Home button on the PARS navigation bar, which is used to go to the PARS start page, change your password and log out of the system.
Search	Selecting this button will take you to a search engine. Search engines provide a means by which you can search for specific sites or information.
Print	Enables you to print the contents of the browser. This feature will allow you to print all reports generated in PARS.
Security	Protects a computer system and its data from harm or loss. Selecting this button provides information about the security configuration of your Internet browser. Security settings include passwords, security information, security certificates, and cryptographs modules.
Stop	Clicking on this key will stop a new Web page from loading.

Table 1: Internet Browser Tools

Navigation

PARS contains a navigation bar, located on the top of the screen throughout the application that allows you to select or change the active PARS view. There are often multiple ways to navigate and accomplish a specific task in PARS. This manual does not provide comprehensive examples

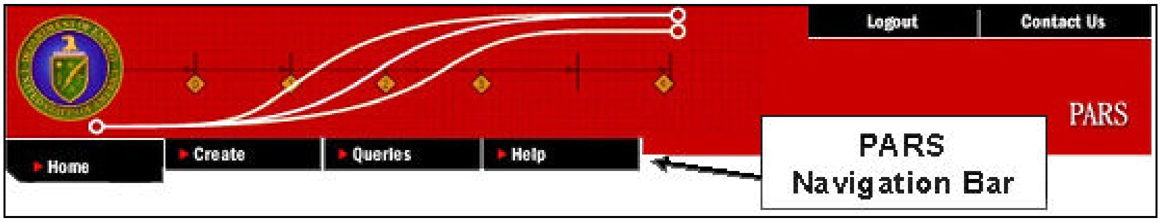
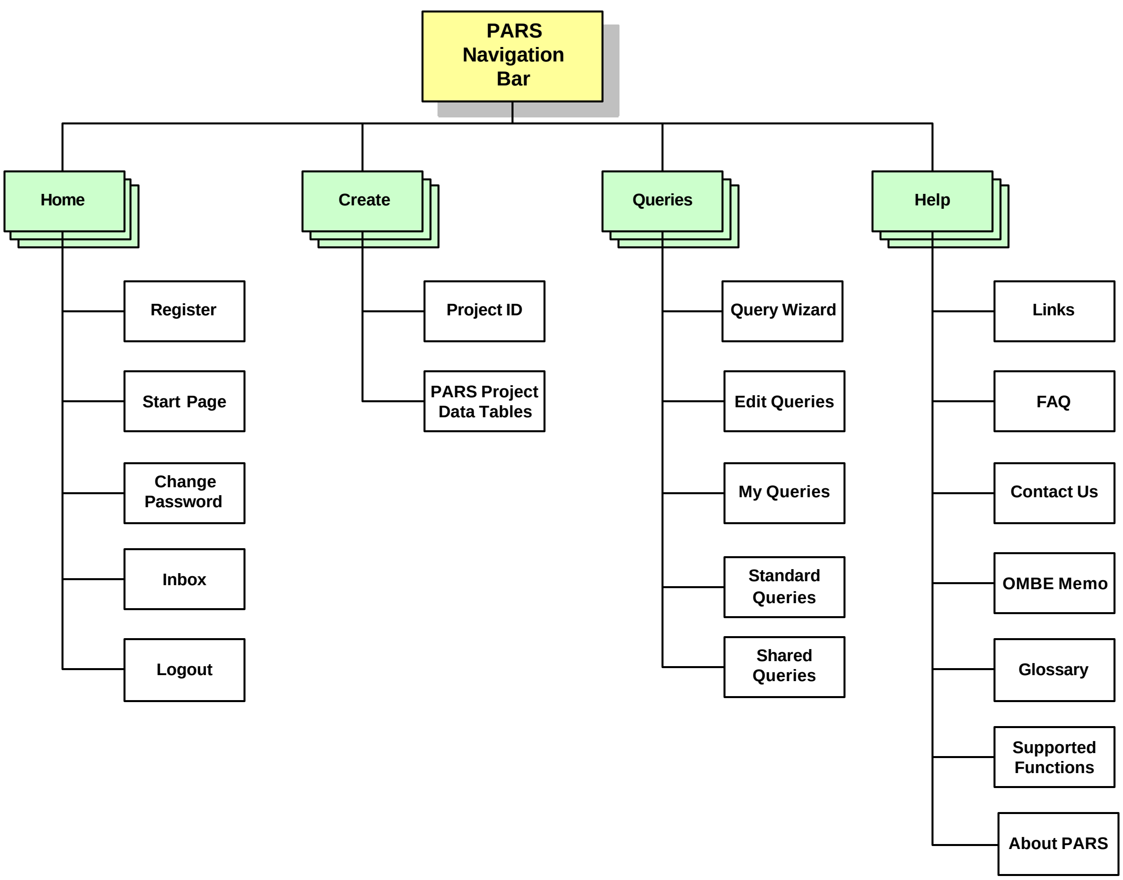


Figure 7: Navigation Bar

of all the possibilities available. Instead, it presents a set of common, easily understood steps based on a more systematic pedagogical approach. As you gain experience, you may discover better, more efficient methods or a particular systematic approach that you prefer. There are no right or wrong approaches - only those that enable you to accomplish your task to your satisfaction.

The figure below illustrates the navigation bar options. Detailed descriptions of these items are included in the sections that follow.

Figure 8: Navigation Sitemap



Home

From the ***Home Menu***, you have the ability to *Register* a new user (create an account for someone), go to the *Start Page*, *Change Your Password*, select your *Preference* in the type of format with which you would like to display graphs, check your *Inbox*, and *Logout* of PARS.

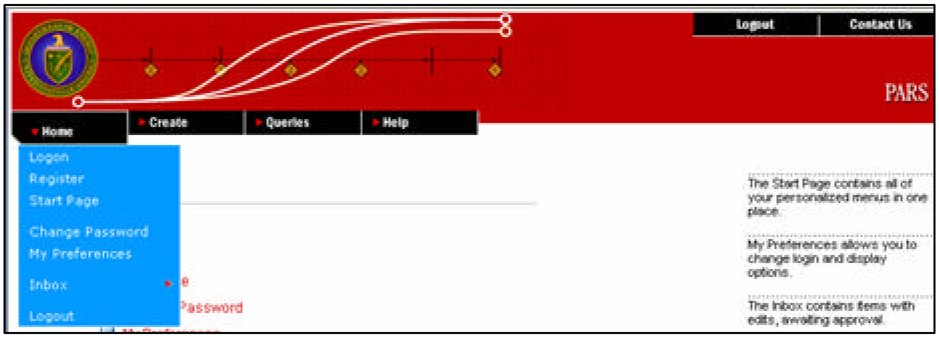


Figure 9: Home Menu

Create

From the ***Create Menu***, you have the ability to create a PARS project review, create a new project, or create a new record in any of the PARS project tables. For further information about adding records to project tables, please see the Data Entry section. Attachments and uploaded files can be added to projects and to quad charts via this menu.

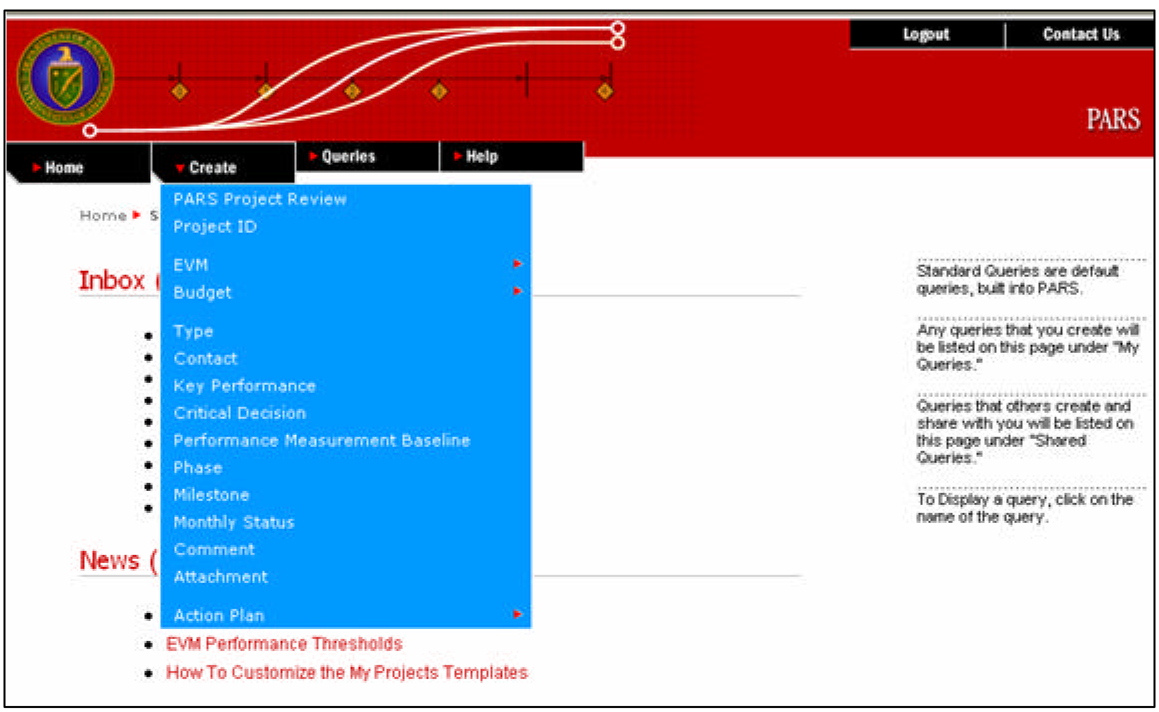


Figure 10: Create Menu

Queries

From the ***Queries Menu***, you have the ability to view or edit any queries that you have been given rights to. These include all of the Standard Queries, My Queries and Shared Queries. You also have the ability to create a completely new query or edit any of the existing queries by using the query wizard. For further information, please refer to the Queries section of this manual.

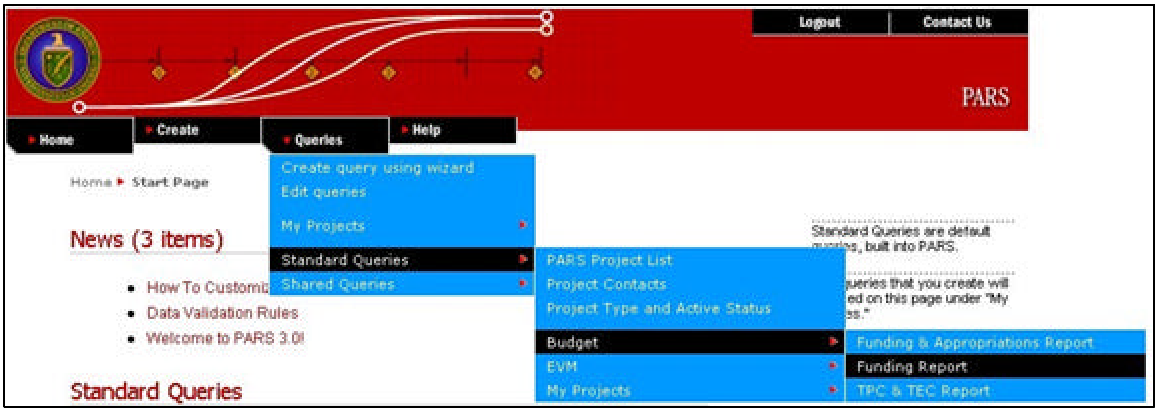


Figure 11: Queries Menu

Help

The ***Help Menu*** provides you with a list of pertinent links related to PARS, DOE, OECM, individual programs, and project management; a set of Frequently Asked Questions along with their answers; PARS contact information; the OMBE memorandum containing PARS reporting requirements; a dynamic query-based glossary of sortable terms; a copy of this user manual; a data dictionary (available in .pdf to download) defining key terms and fields in the PARS system; a set of supported functions in the query engine; and a brief history of PARS. For further information, please refer to the Help section.

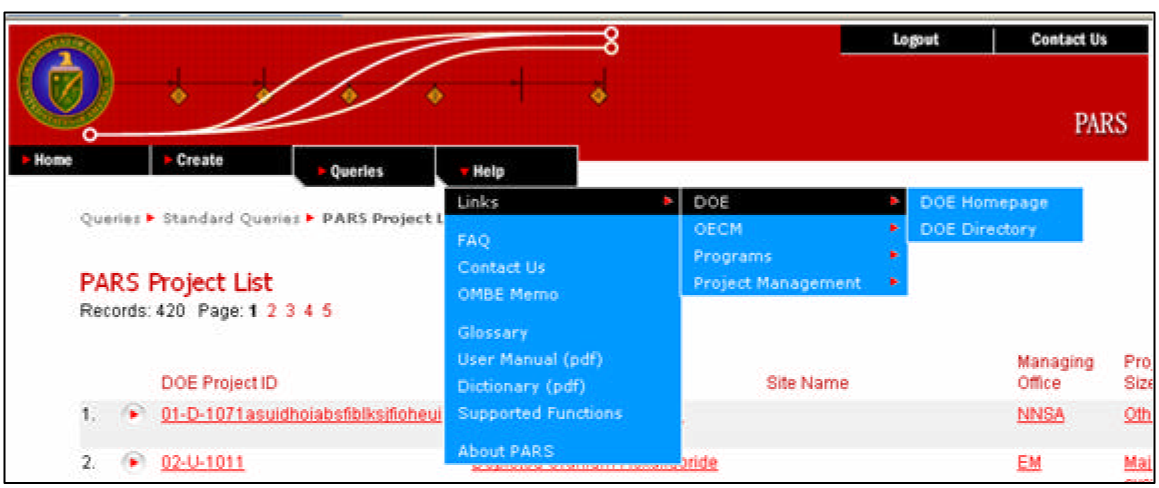


Figure 12: Help Menu

PARS Menus

In addition to the Navigation Bar menus discussed above, there are several other prominent menus found throughout the application that will provide you with robust functionality.

Record Menu

The ***Record Menu*** can be found by placing your mouse over the black (or red) triangle icon located just to the left of all project records. This menu provides you with the ability to: *View full record* - view this data and all "child table" data beneath this record; *View record* - view only this data; *View quad chart* – view a snapshot report of key project data; Edit the record, *Duplicate* the record; *Delete* the record; *Undo* all uncommitted changes to the record; *Send* the record to another user for review and/or approval; *Add a remark* to the record; *View modifications* – view recent modifications to the record; *Accept changes* to the record; and *Validate* all data.

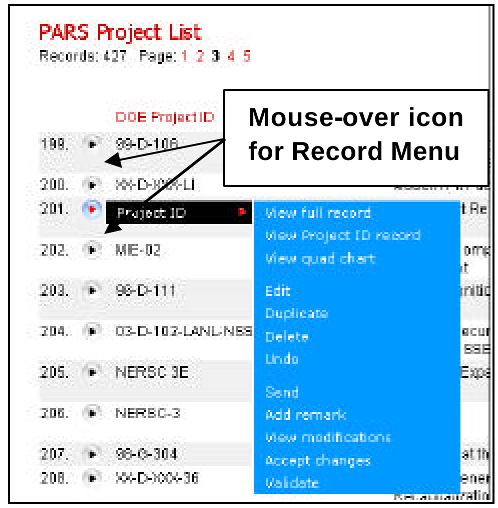


Figure 13: Record Menu

Query Menu

The ***Query Menu*** can by found by clicking on the heading of a query or sub-query. This menu provides you with the ability to modify the query in any way by entering the "Query Wizard." The ***Query Menu*** provides you with the functionality to *Edit* any of the data contained within the query (provided you have the proper rights and permissions); *Download* the data into HTML, MS Word, MS Access, or MS Excel formats; *Add Records* to the viewable data tables; and navigate through the different pages of the report.

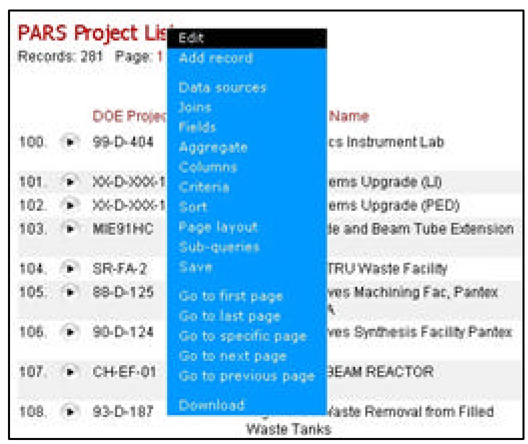


Figure 14: Query Menu

Column Menu

The ***Column Menu*** can be found by clicking on a column heading within query or sub-query (often a child table). This menu provides you with functionality to: view the *Column properties*, *Sort* the report in ascending or descending order by one or multiple fields, *Graph* any values in the report and review a context sensitive *Help* describing the data field and source for the column that you have selected. See the Report Options From the View Query Page section for further details.

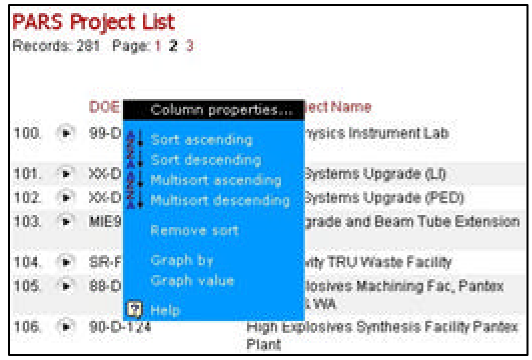


Figure 15: Column Menu

Field Menu

The ***Field Menu*** can be found by clicking on any individual field within a query. This menu provides you with the functionality to filter the report based on several different criteria: records with fields *Equal to* the selected value, *Not equal* to the selected value, *Greater than* the selected value, *Greater than or equal* to the selected value, *Less* than the selected value, or *Less than or equal* to the selected value.

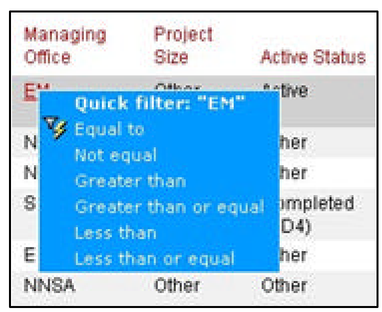


Figure 16: Field Menu

Start Page

The Start Page is the PARS home page. After a successful logon, your customized Start Page will be displayed. You will frequently return to your Start Page to run Reports, click on shortcuts to My Projects, visit your Inbox, and read News about developments affecting the PARS user community. Most of the features on the Start Page are available from anywhere within the application by using the dynamic menu bar across the top of the screen. See the Navigation section of this manual for further information.

Overview

The PARS Start Page is customized for each individual user and will become your personalized home page. You will have access to many of the features and functions in PARS from the Start Page. The Navig ation Bar, located across the top of the screen, provides access to the navigation menus. The Start Page contains a series of folders, which contain a label (in bold) with a gray underline. Each of these folders will be discussed in the order in which they appear on your screen. They include: Inbox, News, Standard Queries, My Queries, and Shared Queries. If any one of these folders does not appear on your Start Page, it's only because there is nothing to be displayed.

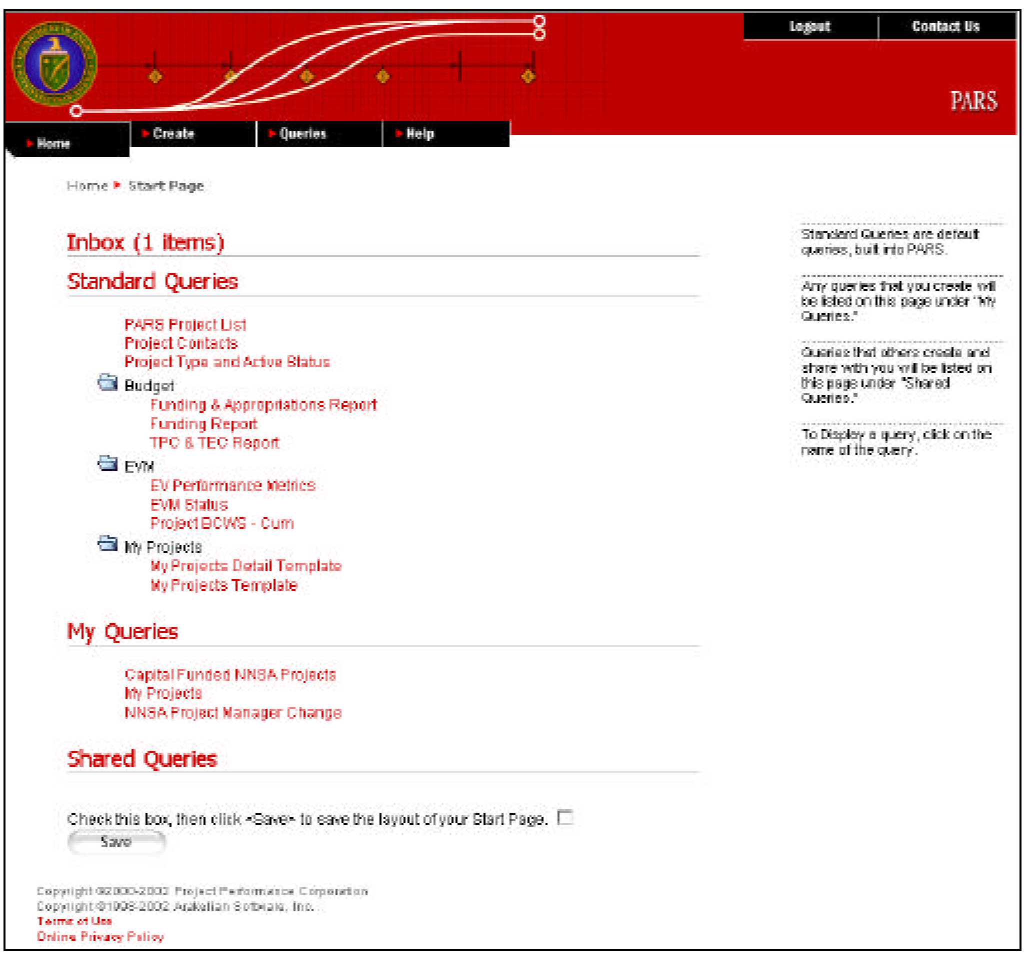
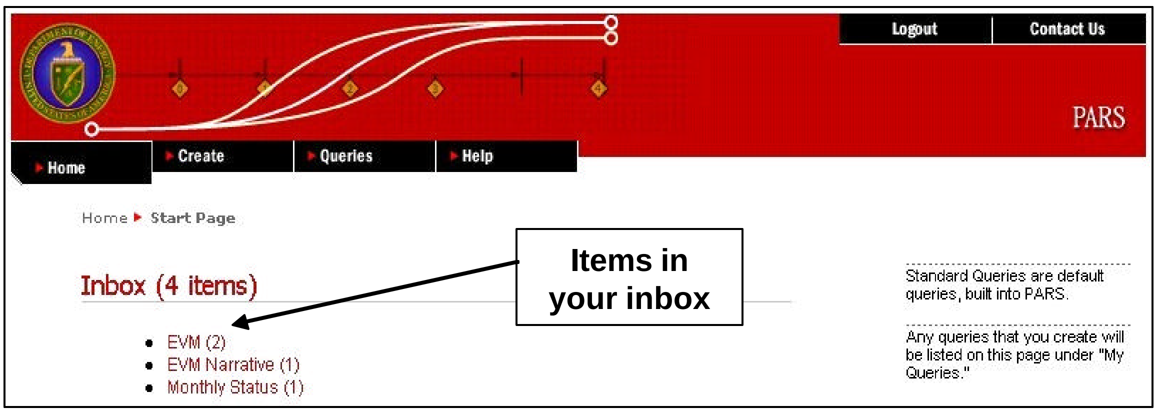


Figure 17: Start Page

You can customize the Start Page to your own personal preference by collapsing any of the given folder headings. To do this, you simply need to click on the heading name. You will see the folder collapse. To expand the folder, you can click on the collapsed folder heading. Once you have the page layout that you would like, click the check box at the bottom of the page that reads, “Check this box, then click <Save> to save the layout of your Start Page,” and click the <Save> button.

Inbox

Your inbox contains notifications about project data that you have either added or edited, but not yet accepted.[2] These items will remain in your inbox until the changes have been accepted or undone. Once you accept the changes, the data is committed to the database for all users to see.



The “Inbox” will only appear if there are uncommitted records awaiting your action. The number of records awaiting action is located next to the heading, “Inbox.” Directly below this heading is a list of tables in which there are records awaiting your action. The number of records within each given table is located to the right of the table name. The Inbox contains any new or updated records. Please see the Saving and Accepting section for information about how to Accept, Edit or Send items from your inbox.

News

The “News” section provides you with up-to-date information regarding PARS. The news section includes: announcements, release information, quick work-arounds, and development progress. The number of News items is listed next to the heading. To view a News item, simply click on the title of the item, for example, “EVM Performance Thresholds.”

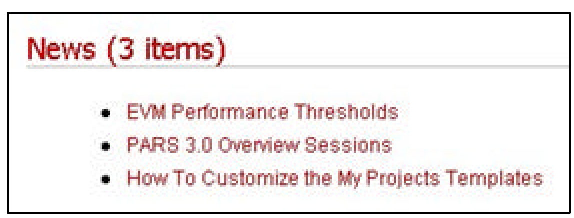


Figure 18: News Announcements

[2] Data entry/editing in PARS is structured around a two-step process. Data is initially added or modified and saved. Upon saving data, it is marked as uncommitted and displayed as redlined markup text. In order to commit data, it must be accepted by a duly authorized user (usually the Federal Project Director).

Standard Queries

Standard Queries are formal reports that have been created within PARS. These reports contain different sets of frequently accessed project data. The OECM Representative and PARS Administrator work together to create these reports. For more information about these reports, please refer to the Standard Queries section.

My Queries

If you would like to easily retrieve a set of project data that is not already presented in a standard report, you can create a custom query (or modify a standard query) that meets your specific needs (see the Create a New Query or the Modify a Query sections for more information). After creating (and saving) a custom query, a "My Queries" folder will appear on your Start Page. The newly created query will be in this folder. All future custom queries that you create will also appear in this folder.

The most common query for users to create is a "My Projects" query. This query can be quickly created by modifying the Standard Query titled "My Projects Template." This will provide you with a shortcut to your individual project list. For further information on creating a "My Projects" query, please refer to the Modify a Query section. There is also a tutorial available online in the News section titled "How to Customize the My Projects Template."

Shared Queries

After creating a custom query, you have the ability to share your query with other users in the PARS community. When you save a query, you are able to select individual users with whom you would like to share the query as well as user groups with whom you would like to share the query. All shared queries created by other users on the system will be located in your "Shared Queries" folder (remember, your own custom reports appear in your "My Queries" folder). If an individual does not have the rights and permission to view the data (see the Rights and Permissions section for further information), then he or she cannot view the query even though you have shared it with him or her.

For information about how to share a query, please refer to the Queries section.

Data Entry

The data entry screens provide a complete view of all the current data in a project record. You can interact with the data entry screens to create new projects, update existing projects, and delete specific data or entire projects from the database. The data entry screens permit you to maintain all project data and ensure that they are accurate, complete, and reliable.

Data Model

Before you enter and modify data, you must first know where to find it (or put it). The data model is a schematic depiction of the relationship between the various tables in PARS. It illustrates the database design layout, a sort of roadmap for PARS. Take the time to become familiar with the data model, as it will not only help you find your project data efficiently, but will also help you take advantage of the hidden potential in the database design. A simplified version of the model is shown on the next page; the full model can be found under the ***Help Menu*** on the navigation bar.

Database Primer

Individual database values are stored in fields. An example would be the Total Project Cost (TPC) for your project. Collectively, several fields are organized in a table. The collection is based on specific design considerations such as: commonality, reporting frequency, whether single or multiple values will be reported, etc. For example, TPC is organized in the same table as TEC and OPC. Each unique set of values is referred to as a record. In PARS, a record is usually associated with an individual project. As a further extension of this example, each set of values for TPC, TEC, and OPC relate to a specific project. Each record in the funding table must relate back to the Project ID table. This link is established by associating each record with the specific DOE Project ID. Therefore, it is not sufficient to simply enter TPC, TEC and OPC. You must also enter your DOE Project ID to associate the record with your project.

It is often helpful to visualize a table in a tabular format with columns corresponding to the various fields and each row corresponding to a record.

PARS Data Model

The PARS database consists of 22 tables. The figure below presents the data model layout. For simplicity, no fields are included in the tables; only the table names appear on the top of each box. The table following the figure contains a brief description of each table's content and function. For a more detailed description of all the tables and fields, you can download the data dictionary (.pdf file) from the ***Help Menu*** in the navigation bar.

Figure 19: PARS Data Model

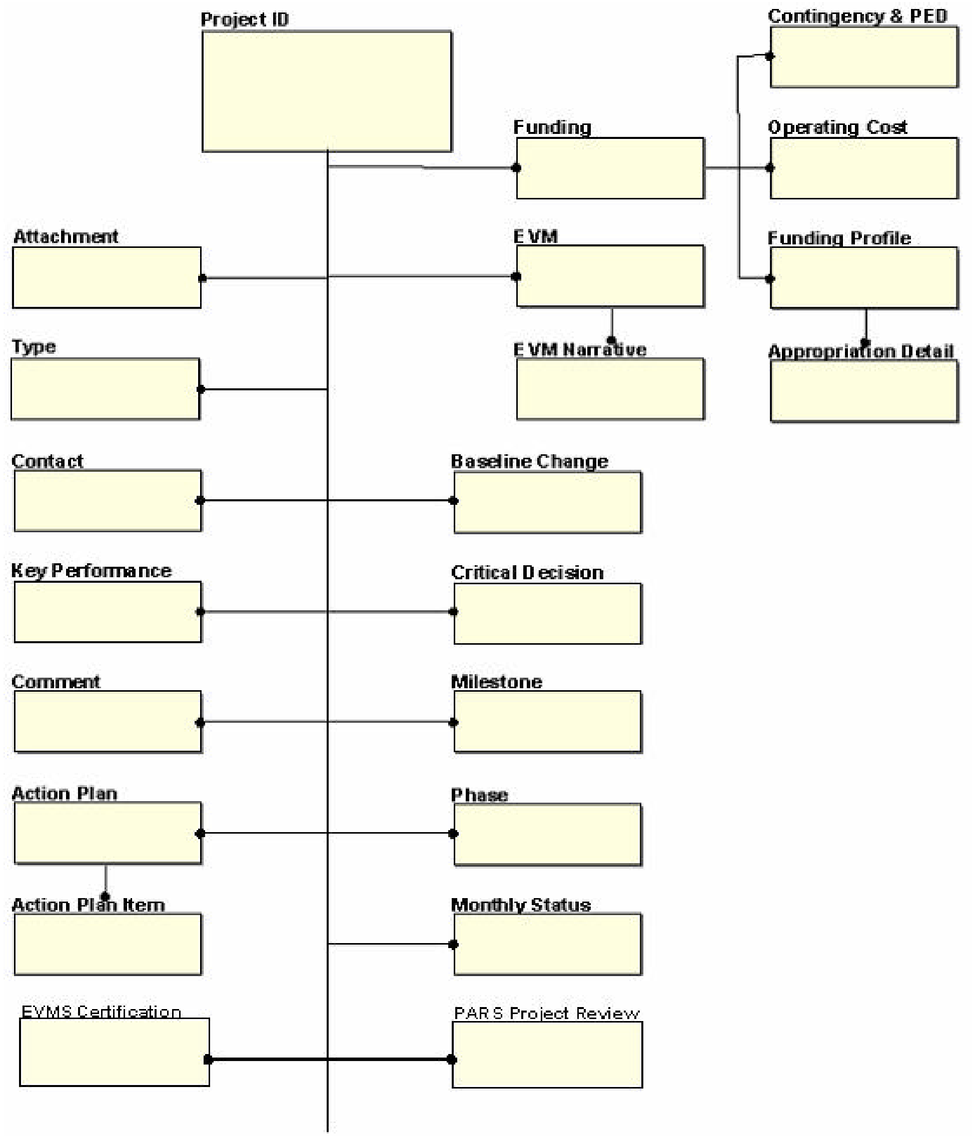


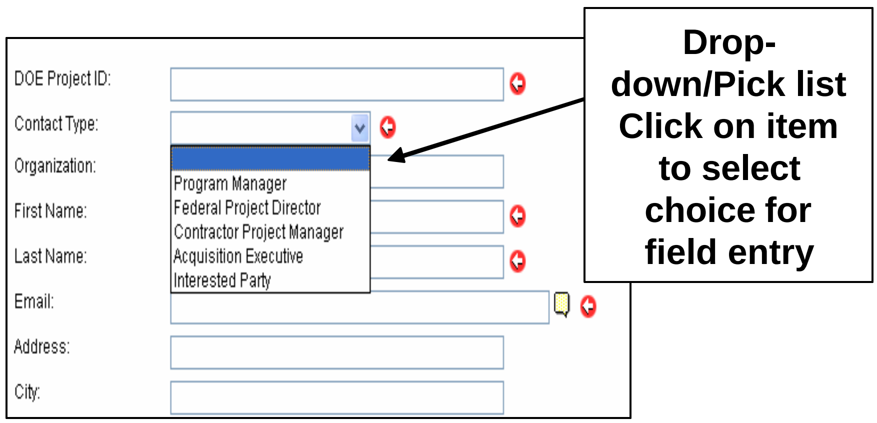
Table	Description
Project ID	Project identification table containing information about the project. This is usually the first table of information configured with project data when creating a new project.
PARS Project Review	Table containing information about project reviews performed by either internal or external organizations.
Action Plan	Table containing the name and current status of action plans for a project. This is the parent table to the Action Plan Items, which contains the individual tasks associated with the Action Plan.
Action Plan Item	Table containing the individual tasks that are part of an action plan. This is the child table to the Action Plan table.
Attachment	Table of all project attachments. Attachments can be MS Office documents, Adobe pdfs, or images (jpeg or gif).
Performance Measurement Baseline Change	Table containing baseline change information.
Type	Table containing project type descriptors.
Comment	Table containing comments on any aspect of the project.
Contact	Table containing key project team contact information.
EVM	Table containing monthly Earned Value Management data on a project.
EVM Narrative	Table containing monthly cost and earned value narratives for the project.
EVMS Certification	Table containing information about contractor review for EVMS certification.
Critical Decision	Table containing Critical Decision (CD) dates and approval status.
Key Performance	Table containing Key Performance Parameters (KPPs) for project.
Milestone	Table containing important project milestones.
Phase	Table containing the start and end dates for each phase of the project.
Watch List	Table containing Watch List identifiers for projects.
Monthly Status	Table containing monthly progress narratives for the project.
Performance Baseline	Table containing aggregate cost, funding, and appropriation data. This is the parent for the following tables: (1) Funding Profile, (2) Contingency, and (3) Operating Cost.
Appropriation Detail	Table containing appropriation details at the Congressional control level. This is a child to the Funding Profile table. Annual funding and appropriation amounts at the Congressional control level are rolled up in the Funding table.
Contingency & PED	Table containing annual contingency estimates. This is a child table to the Funding table. Values from this table are aggregated in the Funding table.
Funding Profile	Table containing annual funding and appropriation data as reported on the Project Data Sheet. This is both a parent table to the Appropriation Detail table and a child to the Funding table.
Operating Cost	Table containing annual operating estimates for the project. This is a child table to the Funding table. Values in the Operating Cost table are aggregated in the Funding table.

Table 2: Description of Data Tables

Entering Data

Data can be entered into a field that is blank (an unpopulated record), or into a field that already contains an entry (a populated field). Unpopulated records can be "filled" simply by typing in the necessary data and then clicking on the <Save> button. Fields do not become populated until they are saved <u>and</u> accepted (see Saving and Accepting). Certain fields require data to be entered in specific formats. In all instances, data must be entered without formatting or units. Such formatting is displayed automatically by the system after data entry. For example, it is not necessary to type a dollar sign ($) prior to a number when entering a dollar amount. When entering numeric data, type the data exactly as you intend it to be displayed. The numeric data should display exactly as typed, but the system may truncate decimals in some instances. When entering words or letters, the entries will appear exactly as typed, so be aware that when abbreviations are used, they will be shown in the field. For date datatypes, the typical format to use is the standard mo/day/year, with either a 1- or 2-digit month and day (both are accepted by the system) and a 4-digit year entry.

Example: The date September 10, 2004 can be entered as 9/10/2004 or as 09/10/2004.



Some fields are populated based on the selection of an option from a drop-down or pick list. In this case, select the appropriate entry by clicking on the item. The item will then become highlighted and will fill the field.

Some fields in PARS are populated by the user, while others are calculated and system generated, based on the user's entries. If a field does not appear during the creation of a record, then that field is likely automatic or system generated.

Saving and Accepting

PARS is designed with a dual entry and review process. If you are responsible for entering the initial data, you must save your changes and then forward the changes to your Federal Project Director for final review and acceptance into the database. Generally speaking, the person responsible for entering data should not commit the data to the database. By enforcing this two-step data entry and review cycle in the work process, fewer errors will be made.

The established system of rights and permissions is consistent with this work process. Users who are responsible for entering data typically have the privilege to save data. Once all data has been entered, click <Save> or <Save/Done>. Clicking the <Save> button will leave all of the fields open so that you can continue to make updates. This button is important for frequent saving while you are working. Clicking the <Save/Done> button will close all fields and should be used after you have completed your edits.

When all changes have been saved, you have several options that appear on the record menu. These options include to *Accept changes*, *Send*, *Add Remark*, *Delete* or *Undo*. You must take the appropriate action consistent with the rights and permissions associated with your user group assignment. See the Rights and Permissions section for more detail. These options include:

- *Accept changes* - You must approve changes by selecting *Accept changes*. Saved data will not be committed to the database until you accept it. All saved data is held in suspense from the real-time database until it has been accepted. Calculated fields will only be calculated using accepted data, not redlined markup text. All unaccepted data will appear as redlined markup text in reports run by other PARS users. If you choose not to approve the data for the time being, the record will be placed in your inbox for approval at a later time;
- *Send* - You may forward a project record with comments to other users (normally your Federal Project Director) via the PARS internal mail system by selecting *Send* from the record menu. You should forward a project record to someone with accept privileges (normally your Federal Project Director) to comply with the two-step data entry and review process described in the Saving and Accepting section. For more information about sending a record, please refer to the Using Your Inbox section;
- *Add remark* - You may include a comment about the project by selecting *Add Remark* from the record menu. You should enter any useful remarks and click <OK> to insert the remarks into the modification history record. We advise you to include remarks on all your data edits as a memo for future reference. You should also forward remarks with your data to focus the recipient's attention on the specific changes that you have made. You will be prompted to add a remark anytime you send a record (see above);
- *Undo* – You may undo any changes that have not yet been approved by selecting *Undo* from the record menu. Once you select to undo an action, that action cannot be reversed. This button has the effect of erasing all the changes that were previously saved but not yet accepted. This is true for any redlined markup text in the record with which you are working, not only changes that you have made; or
- *Delete* – You may delete an entire record by selecting *Delete* from the record menu. This function will mark the entire record for deletion (not just the redlined markup text). You will still have to accept this deletion in the same way that you have to accept any other change that you make to your data. See the Saving and Accepting section for further detail.

However, those people who entered the data typically cannot commit these changes to the database since this privilege is reserved for a user with higher authority (typically a Project or Program Manager) who is responsible for verifying the accuracy of the data. Users who can commit data to the database will have the "Accept changes" option available to them on the record menu. If you do not see the "Accept changes" option on the record menu, then your group assignment established by your local Site or Program Administrator does not permit you to edit, save, or commit data to the database. For a more detailed description of the rights and

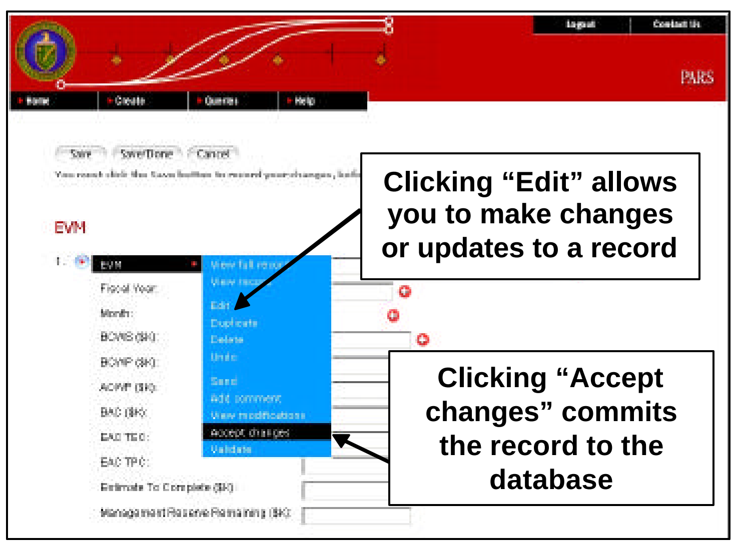


Figure 20: Accepting New Data

permission system, please consult the overview of Rights and Permissions section of this manual.

It is important to note again that saving data does not commit the data to the database but rather saves the data so that you can continue to add, edit, or delete at a later date. This data will be saved in your Inbox until it has been accepted. Saved data will appear on all queries configured to show redlined markups. Accepting data will commit it to the database. You must save and accept each record that you create or update in order to commit the data to the database.

Create a New Project

You add a new project to the database by "creating" it.

1. On the navigation bar, place your mouse over the ***Create Menu*** and select *Project ID*.
2. Enter the project data. Much of the data contains information that needs to be keyed into the appropriate boxes. Some fields provide pick lists to select the appropriate data (refer to the Entering Data section). Be careful to review your data as you enter it to make sure that it is accurate.
3. Click <Save> or <Save/Done> to save your data for later acceptance. Once all data has been entered, follow the two-step data entry and review process described in the Saving and Accepting section. For more information about sending a new project and/or record, please refer to the Using Your Inbox section.

Completing the Monthly Update

The PARS requires that data elements be reported at different times during the project life cycle. Figure 21 displays the update frequency schedule for key project parameters. Each month, there

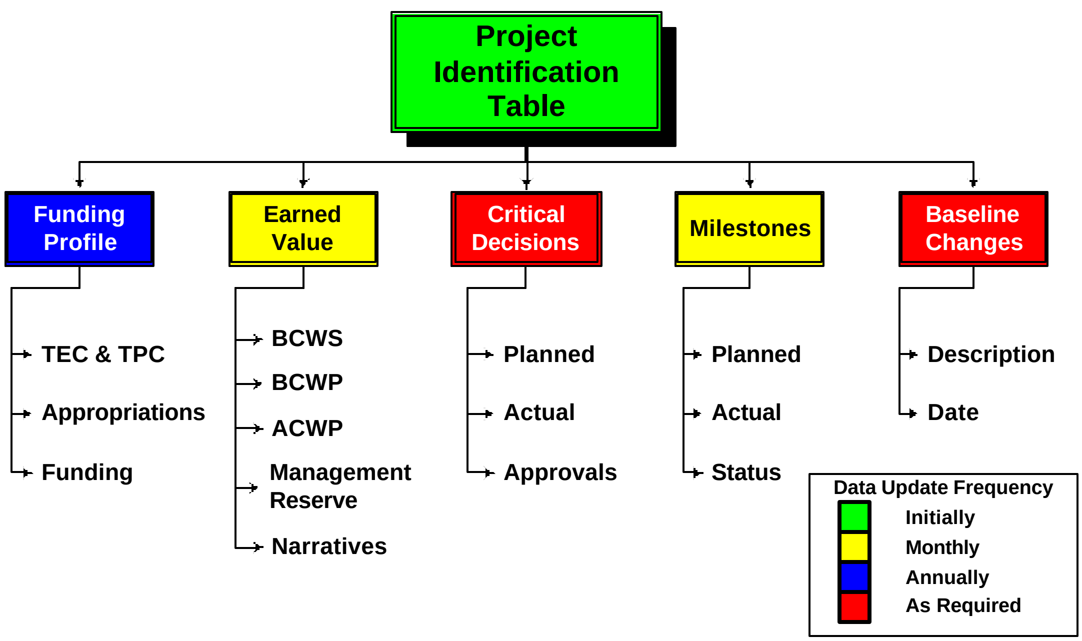


Figure 21: Data Entry Frequency Chart

are three tables that must be updated. These tables include the EVM table, the EVM Narrative table, and the Project Status table. Milestones are defined by the Federal Project Director and may also be updated on a monthly basis.

Create a New Record

To update your project with the new month's data, you need to create new records in the appropriate tables. There are two methods for doing this. The preferred method involves using the ***Create Menu*** on the navigation bar. To create a new record using this menu, please take the following steps:

1. Place your mouse over the ***Create Menu*** and select the table whose record you would like to add.
2. An unpopulated record will appear for you to fill out. The DOE Project ID is the unique key that will associate this record with the rest of your project. If you incorrectly type this DOE Project ID, then you will see an error message requesting that you change your DOE Project ID, or you may erroneously attach the new record to a different project. For more information on this topic, please see the Data Validation section.
3. Once the record has been populated, you must save the data by clicking either the <Save> or <Save/Done> buttons.
4. When all changes have been saved, follow the two-step data entry and review process described in the Saving and Accepting section.

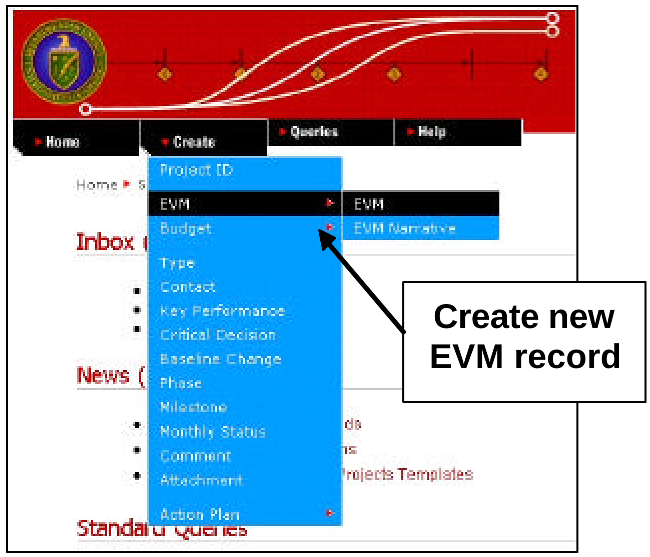


Figure 22: Create New Record from Create Menu

Find a Project Record section.

Once you are viewing your full project record, you may take the following steps to add a new record:

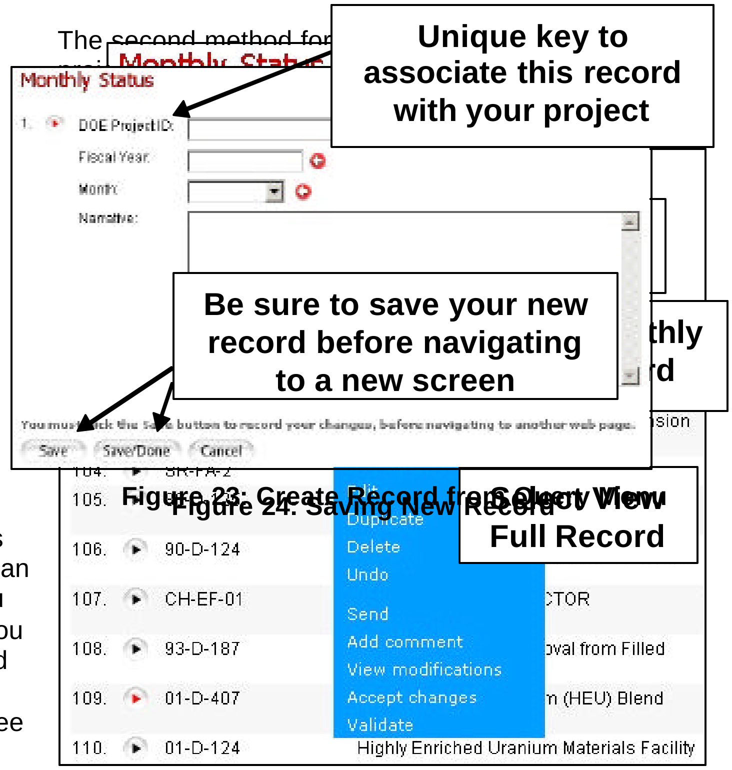


Figure 25: View Full Record

1. Locate the table in which you would like to add a record.
2. Click on the table heading to pull up the ***Query Menu*** and select *Add Record* from the menu.
3. An unpopulated record will appear for you to fill out. The DOE Project ID is the unique key that will associate this record with the rest of your project. If you incorrectly type this DOE Project ID, then you will see an error message requesting that you change your DOE Project ID, or you may erroneously attach this record to a different project. For more information on this topic, please see the Data Validation section.
4. Once the record has been populated, you must save the data by clicking either the <Save> or <Save/Done> buttons.
5. When all changes have been saved, follow the two-step data entry and review process described in the Saving and Accepting section.

Modify a Project Record

You may edit any project that has already been populated with data, provided you have the proper permissions. See the Rights and Permissions section for further detail.

There are two different ways that you can edit a project. You can change existing project data or you can add new project data. This section describes the process for changing existing project data. To update your project with new data, please see the Completing the Monthly Update section.

Find a Project Record

There are many different methods that you may use to find your project. The recommended method is to run the "My Projects" query located on your start page. If you have not created a "My Projects" query or "My Project Details" query, please see the Modify a Query section for instructions regarding how to modify the templates created for you in the Standard Queries section of the Start Page.

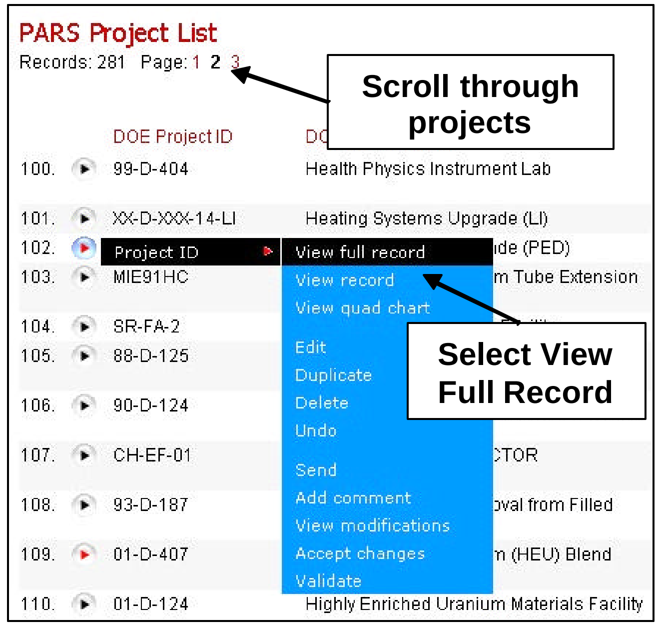


Figure 25: View Full Record

You may also find your project by creating a new query using the query wizard. By doing so, you may choose to view any fields that are pertinent to your needs. For more information on how to create a query using the query wizard, please see the Create a New Query section.

Lastly, you may select your project off the PARS Project List by running this Standard Query. The PARS Project List is an alphabetized list of all projects in the database. To locate your project using this query, take the following steps:

1. From the Start Page, click "PARS Project List" under the Standard Queries heading.
2. Scroll down the page until you have located your project. If your project is not in this page, you may click on "2" or "3" at the top of the page to advance to other pages in this query. You can sort the project list or filter the list using the Quick Filter option available from the ***Field Menu***. For further information on these processes, please see the Report Options from the View Query Page section.
3. After locating your project, place your mouse over the ***Record Menu*** and select *View Full Record*, as shown in Figure 25. You will now see the Project ID table and all of the first generation "child tables" to the Project ID table. If you would like to change data that is not located in a child table to the Project ID table, you will have to drill down by finding the record

that is the parent to the record that you would like to modify and again select *View Full Record* from the ***Record Menu***. For example, if you would like to change the EVM Narrative for a specific month, after viewing the full project record, you will have to find the month's data whose narrative you would like to update, place your mouse over the ***Record Menu*** and select *View Full Record*. You will then be able to edit the EVM Narrative for that specific month.

Edit a Project Record

First, find the project as described in the Find a Project Record section. Once you are viewing the full project record on your screen, take the following steps to edit a project:

1. Locate the record within your project that you would like to modify.
2. Place your mouse over the ***Record Menu*** to the left of the record that you would like to edit. When the record menu appears, select *Edit*. All fields within the record will become editable text boxes and you will have the ability to make any necessary changes.
3. Once all changes have been made, you must save the data by clicking either the <Save> or <Save/Done> buttons.
4. When all changes have been saved, follow the two-step data entry and review process described in the Saving and Accepting section.

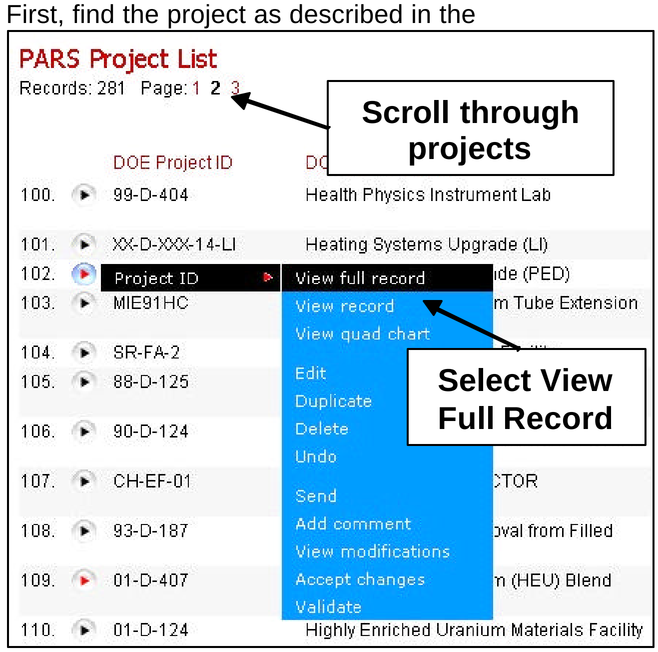


Figure 25: View Full Record

Delete a Record

Delete an Entire Project

PARS has implemented safeguards to prevent accidental deletion of projects from the PARS database. If your project is not active, you may simply change the Project Status field in the Project ID table. The project status options include: *Active, Not Started (Pre CD-0), Completed (CD-4), Closeout, Cancelled, On Hold*, or *Other*. If your project does not meet the criteria for any of the project status options and must be removed from the database, please contact the technical support desk. See the Contact Us section of further details.

Delete Selected Project Data

First find the project as described in the Find a Project Record section. Once you are viewing the full project record on your screen, take the following steps to delete selected data in the project record:

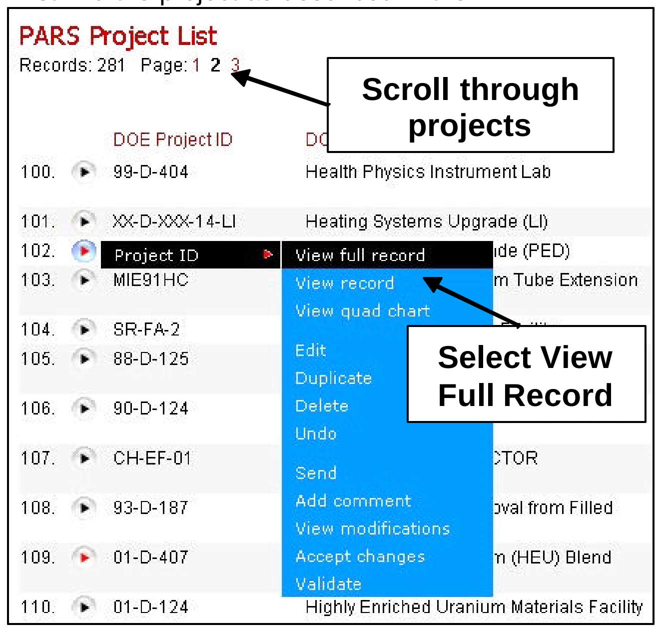


Figure 25: View Full Record

1. Locate the record or individual field(s) that you would like to delete.

    - If you would like to delete an entry in a single field, place your mouse over the ***Record Menu*** and select *Edit*. Place your mouse in the field that you would like to delete, highlight the data, and press the delete key on your keyboard. You may enter as many changes and deletions as you desire. Click <Save> or <Save/Done> to save the field changes and deletions. This will mark the record for deletion; or
    - If you want to delete an entire record, place your mouse over the ***Record Menu*** to the left of the individual record and select *Delete*.

2. When a deletion or change is made, the data will be marked with a red strikeout (for deletions) or a red underline (for changes). You have four options after saving your record. You must take the appropriate action consistent with your rights and permissions associated with your user group assignment. See the Rights and Permissions section for more detail.

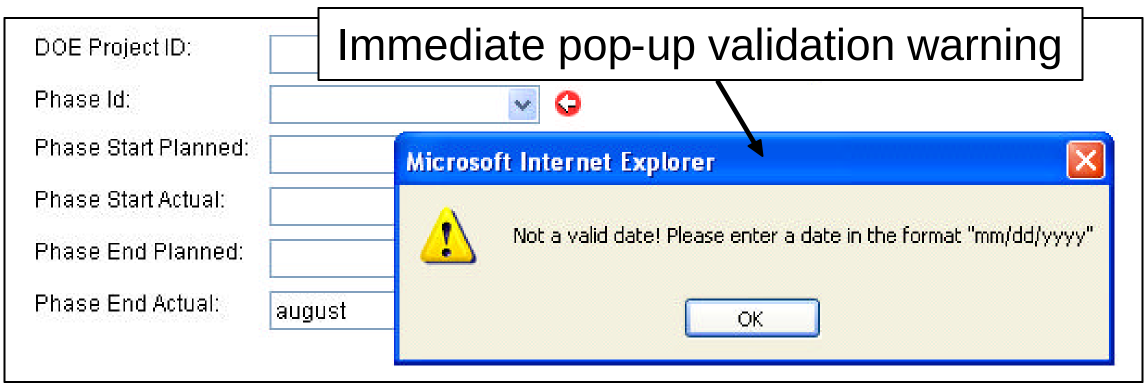
    - *Accept Changes* - You must approve changes by selecting *Accept changes*. Saved data will not be committed to the database until you accept it. All saved data is held in suspense from the real-time database until it has been accepted. Calculated fields will only be calculated using accepted data, not redlined markup text. All unaccepted data will appear as redlined markup text in reports run by other PARS users. If you choose not to approve the data for the time being, the record will be placed in your inbox for approval at a later time;
    - *Send* - You may forward a project record with comments to other users (normally your Federal Project Director) via the PARS internal mail system by selecting *Send* from the record menu. You should forward a project record to someone with accept privileges (normally your Federal Project Director) to comply with the two-step data entry and review process described in the Saving and Accepting section. For more information about sending a record, please refer to the Using Your Inbox section;
    - *Add Remark* - You may include a comment about the project by selecting *Add remark* from the record menu. You should enter any useful remarks and click <OK> to insert the remarks into the modification history record. We advise you to include remarks on all your data edits as a memo for future reference. You should also forward remarks with your data to focus the recipient's attention on the specific changes that you have made. You will be prompted to add a remark anytime you send a record (see above); or
    - *Undo* – You may undo any changes that have not yet been approved by selecting *Undo* from the record menu. Once you select to undo an action, that action cannot be reversed. This button has the effect of erasing all the changes that were previously

saved but not yet accepted. This is true for any redlined markup text in the record with which you are working, not only changes that you have made.

Once a project record that has been marked for deletion is accepted by clicking <Accept>, it is permanently erased from the database. This action cannot be reversed and the data cannot be retrieved. The only way to restore the project data is to manually reenter the data. Use caution when deleting project records.

Data Validation

PARS 3.0 contains new data validation rules that help to enforce accurate data entry. These rules correspond to specific tests that are performed whenever data is entered to ensure that the data will not create a database error or break a logical relationship with other data. When a test of your data fails, a warning message will appear.



These immediate pop-up validation errors are displayed prior to saving and warn of inappropriate data entry. For example, if a data field requires a date to be entered, and a character month is typed, a validation error message will appear. This field can be changed immediately, but if not changed, the inappropriate entry will not be included upon saving other acceptable data.

Upon clicking either the Save or the Save/Done button, you will activate another data validation system within PARS. If a "Warning" appears, then the data must be modified before anything from that entry can be accepted into the database. The validation warning, if any, will appear just below the modification history table and above your data, as shown in Figure 26. To correct any validation errors, you must select *Edit* from the ***Record Menu*** and make the necessary corrections.

The system is designed to generate "friendly messages" whenever a validation test fails. In certain cases, however, you may receive an application or database error message that appears very cryptic. When this occurs, please write down the error message and contact PARS Technical Support to report the problem.

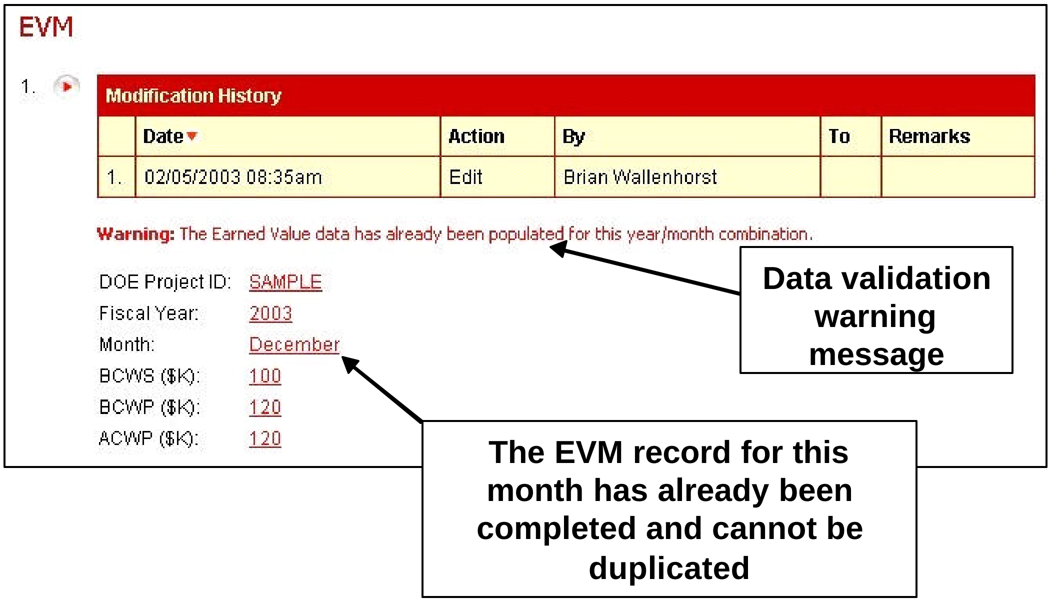


Figure 26: Data Validation Error

Rule	Description
Date Check	All dates must fall between the Project Start Date and the Project Completion Date. This includes Critical Decision dates, Milestone dates, EVM dates, etc.
TPC Check	TEC, PED, etc. must be less than or equal to TPC.
BCWS Check	The sum of all BCWS must be less than or equal to TPC. BCWS and BCWP must be greater than or equal to 0.
Uniqueness Check	DOE Project ID, Month, and Fiscal Year must be uniquely defined for each project. Duplicate values are not permitted. The record my already exist in the database.
Primary Key Check	All child table records must be linked to their respective parent using the DOE Project ID and appropriate date fields.

Figure 27: Basic Data Validation Rules

Using Your Inbox

To access items in your inbox, take the following steps:

1. Click on the table name for the records that you would like to Accept or Send.
2. From this screen, you have the ability to view the record, delete the record, undo any uncommitted changes, send the record to another individual for approval, or accept the changes to the record. To take any of these actions, place your mouse on the red triangle icon to pull up the record menu. From this menu, you may select the action that you would like to take. By clicking *View Record*, you will be able to view any comments that were made by the user who created or edited this record.

3. After Viewing the record, you will be able to take any of the above mentioned actions.

You may also use the inbox to send internal mail (comments) to other PARS users. Since most comments are usually with regard to a particular project, the project record is sent along with the comment to the recipient. To send a project record along with a comment:

1. Locate the specific record in your inbox or from the full project record.
2. Place your mouse over the red (or black) triangle icon to the left of the record that you would like to send and select *Send* from the menu.

3. You will come to a screen that contains a list of all PARS users. Select the user(s) that you would like to send this record to. You may select more than one user by holding down the Ctrl key while selecting the users with your mouse.
3. Enter any remarks that you would like the user to see with the record that you are sending.
4. Click on the <Send> button.

The next time the recipient(s) logon, they will be notified that their inbox has a message awaiting them.

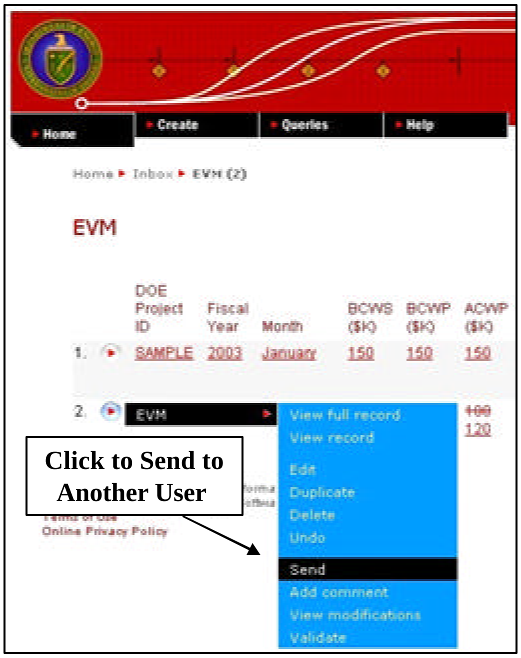


Figure 28: Send Record

Queries

A query is simply a way of displaying certain data in the PARS database. All project data is viewed by creating and/or running a query. PARS uses a system of queries to find projects meeting user-specified criteria. The search results can then be displayed, filtered, and sorted using any one of several reporting options. The PARS system also contains a set of standard queries and custom queries for quick review and analysis of key project data.

Custom Queries

Custom queries are coded to a prescribed format in accordance with DOE requirements. One example is the Quad Chart, which contains summary project information organized into four quadrants on the page. Although these queries minimize work for the user, such custom queries do limit your ability to choose what data is actually presented in the report and how that data is to be presented (e.g. sort order). Because of this, other custom queries may be developed in the future.

<u>Quad Chart</u>

The quad chart is available for all projects in the system. The quad chart is a way of querying data in a single project. It is a report that contains vital project data, including a short description of the project, mission need, project attachments, earned value data, the project funding profile, project contacts, key milestones, and an interactive, printable graph available in three formats. Quad charts may not be modified. To access a quad chart, take the following steps:

1. Access a list of your projects either from a query that you have created (see the Modify a Query section for further information) or from the "PARS Project List" under "Standard Queries" on the start page.
2. Find your project, place your mouse over the triangle icon to the left of the project to pull up the ***Record Menu***, select *Project ID* and then select *View Quad Chart.*

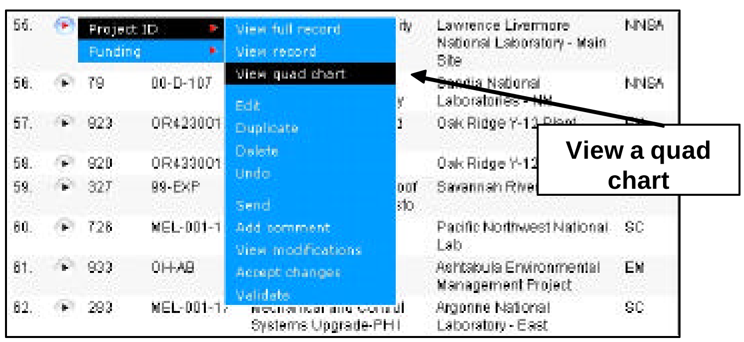


Figure 29: View Quad Chart

The quad chart is designed to present a concise overview of essential project information.

Standard Queries

Several standard queries have been created in the PARS system for quick viewing of the most commonly requested project data. These queries may change over time in response to user demands. A list of standard queries is located on the start page. To view a query, simply click on the name of the query. The OECM representative and PARS Administrator have worked together to create these queries.

Below are descriptions of the standard queries currently available on the PARS system.

Query Name	Query Description (including displayed fields)
PARS Project List	DOE Project ID, DOE Project Name, Site Name, Managing Office, Project Size, Active Status.
Project Contacts	Contact Type, Name, Email Address, Phone Number.
Project Type and Active Status	Project Type, Active Status
Funding and Appropriations Report	Fiscal Year, TPC, TEC, Funding Plan and Appropriations by Year, Total Funding and Total Appropriations
Funding Report	Chart of Funding Plan and Appropriations.
TPC & TEC Report	Fiscal Year, TPC, TEC, OPC
EV Performance Metrics	Fiscal Year, Month, CPI, Cum CPI, CPI Rating, SPI, Cum SPI, SPI Rating.
EVM Status	Month, Fiscal Year, % Complete, CPI, Cum CPI, CPI Rating, SPI, Cum SPI, SPI Rating.
Project BCWS - Cum	Chart of BCWS, BCWP, and ACWP.
My Projects Template	A template for creating a “My Projects” list.
My Projects Detail Template	A template for a detailed report containing all key data fields. This is a printable report of your project data.

Table 3: Standard Queries

These queries are read only. You can modify the standard queries, but you must save the modified version under a new name. When a query is changed and saved, it will appear in your My Queries folder. Instructions on how to modify and save a query are described in the Modify a Query section.

Modify a Query

An easy way to quickly produce a specific query is to modify an existing query. First choose an existing query that most closely matches your desired query. You may choose from any Standard Query, Shared Query, or queries that you have previously generated.

<u>How to Create a “My Projects” Folder</u>

After logging into PARS 3.0, you will come to the Start Page. PARS 3.0 provides you with the ability to create a “My Projects” folder without requiring your name to be placed on the Contacts List of each project that you would like to have in this folder.

You can create your own “My Projects” query quickly and easily using a template that has been provided for you as one of the PARS “Standard Queries.”

Locate the “My Projects Template” found under the “Standard Queries” heading. Click on the name of this query (My Projects Template) to run the report.

You will open a page that contains a template report offering a sample list of projects (in this case, only one titled “Sample”).

Figure 30: My Projects Template

To replace this sample project with a list of your own projects, you will need to modify the query design. To modify the query in a way that will allow you to replace the sample project with a list of your own projects, click on the name of the query (My Projects Template) and select “Criteria” from the pop-up menu.

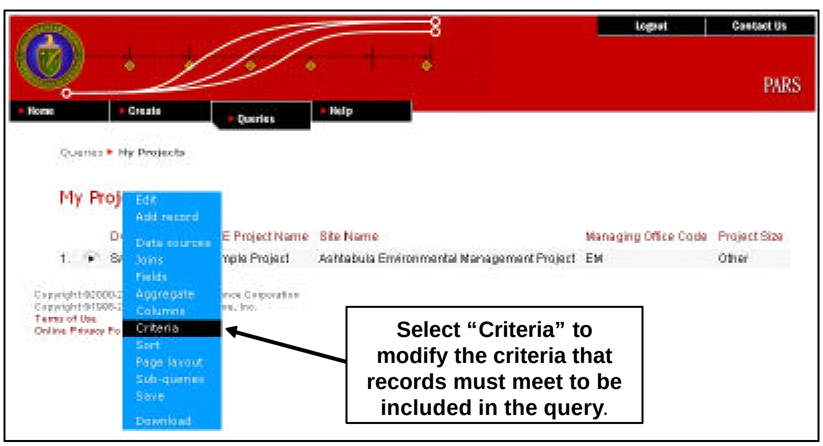


Figure 31: Edit Query

You will come to a section of the query wizard where you have the ability to set the criteria for the query. Setting the criteria enables you to select the individual projects that you would like to have in your report. You will notice that the criteria is currently set to return all projects that have the word “SAMPLE” set as the DOE Project ID number.

You can now change the criteria to meet the criteria for your particular project(s). Simply delete the DOE Project ID, “SAMPLE” and replace it with the DOE Project ID(s) for your projects. Be sure to place your DOE Project ID(s) in quotation marks. You must separate multiple DOE Project ID(s) with the word, “OR.”

After entering the appropriate DOE Project ID(s), you must save the query to retain the changes that you have made. To do this, you may click on either the <Save> button located underneath the section containing criteria, or you can click <Save> on the list of steps in the query design. Both of these will take you to the same screen.

While on the "Save Query" screen, you are given the opportunity to rename this query, rename the folder, provide a description of the query, and share it with other users in the PARS community. These steps are not necessary because you are creating your personalized project list that is already named, "My Projects." If you are satisfied with the query name, folder name and description of the query, you can scroll down to the bottom of the page and click <Save>. This will save the query in your "My Queries" folder of the Start Page.

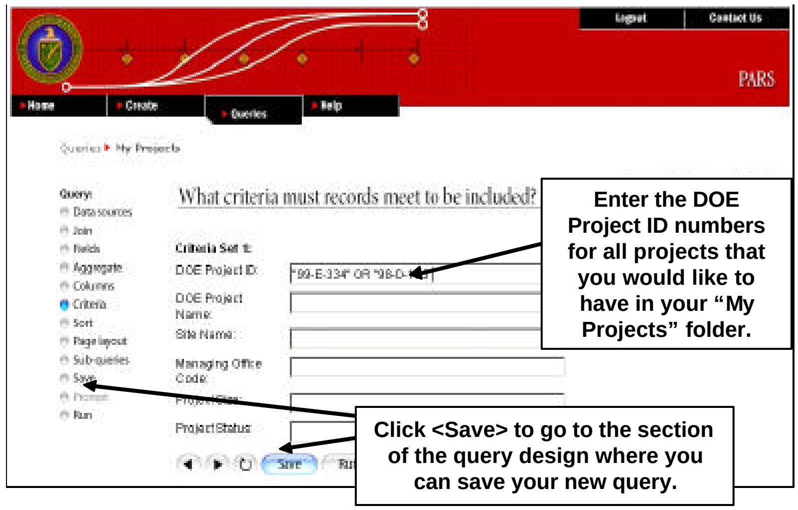


Figure 32: Enter Query Criteria

If you are saving changes you made to an existing query, be sure to check the box marked "Overwrite query with same name and folder if any." This will replace the previously saved query with your most recent changes. Once you save (and replace) a query, you cannot access the previous version.

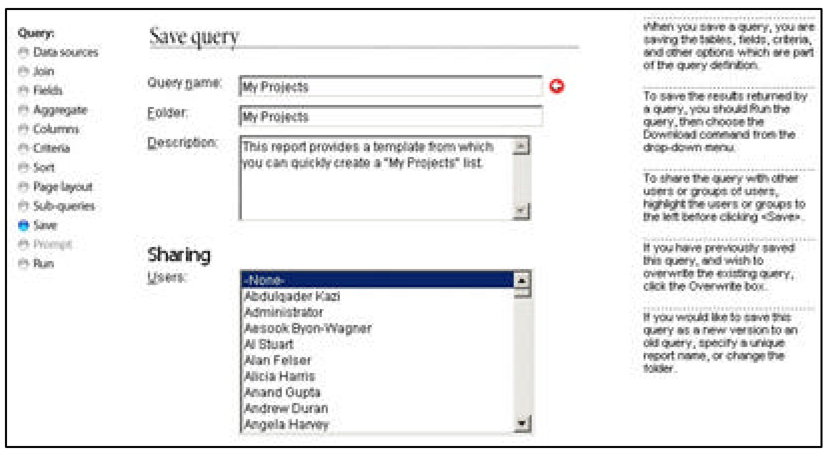


Figure 33: Save Query

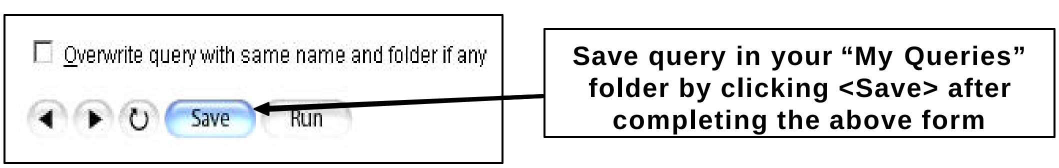


Figure 34: Save Over Existing Query

To view the results of this query, you can return to the start page by placing your mouse on the ***Home Menu*** of the navigation bar and selecting *Start Page*. Click on the name of the query "My

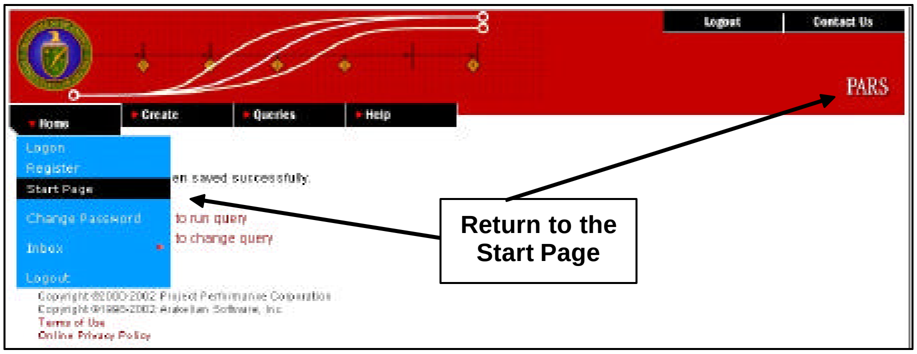


Figure 35: Return to Start Page

Projects" (unless you renamed the query) in the "My Queries" folder to run this query and view a list of the projects that you have selected.

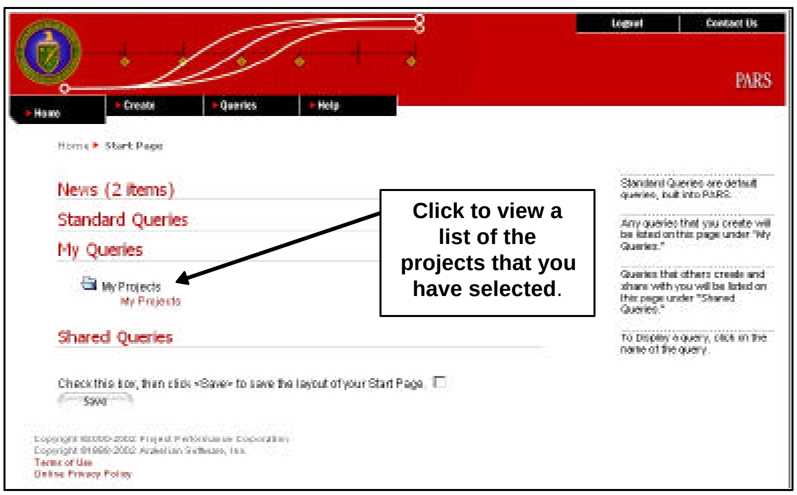


Figure 36: Run Query From Start Page

Create a New Query

PARS 3.0 now contains a powerful query engine that allows you to create queries in a way that your data is displayed in a manner that suits your needs. The "Query Wizard" provides a simple means for you to build a new query from start to finish to filter for project data that meet your specified criteria. PARS 3.0 includes a new feature that allows you to prompt any new queries such that whenever they are used again, the system will automatically bring up a criteria screen for a very specific, efficient and powerful query.

Using the Query Wizard

To create a completely new query, you must step through the query wizard and design the query definition that will call your specific project data. To use the query wizard, place your mouse over the ***Queries Menu*** on the navigation bar and select *Create query using wizard*.

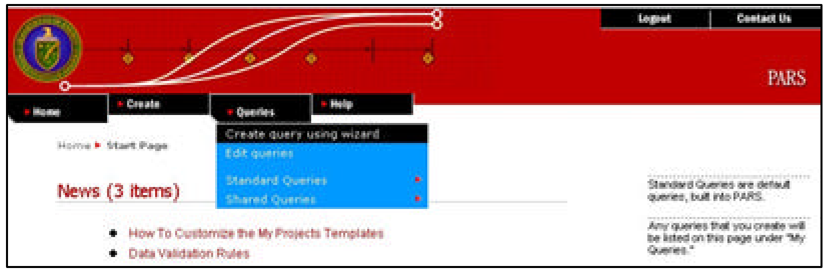


Figure 37: Create Query Using Wizard

The query wizard steps you through the process of creating a query from scratch. The steps for creating a query using the wizard are located on the left side of each page within the wizard. These steps include:

- Data Sources - Select tables containing data from the PARS data model
- Join – Specify how you want to combine (join) data from multiple tables
- Fields - Select the individual fields that will appear in the columns of your query
- Aggregate – Organize complex or abundant data using Aggregate functions (Avg, Max, Min, Sum, etc.)
- Columns – Customize the displayed ordering of columns, create special calculated fields, and hide selected fields
- Criteria – Specify filters to restrict the query dataset
- Sort – Specify the sort order for displaying the dataset
- Page Layout – Control the appearance on the screen and printed page
- Sub-queries – Create separate tables of data within a larger table
- Save – Save your query and share your query with other users
- Prompt – Place a prompt on the query to target specific subsets of data every time the query is run
- Run – Run query to generate data particular to that query

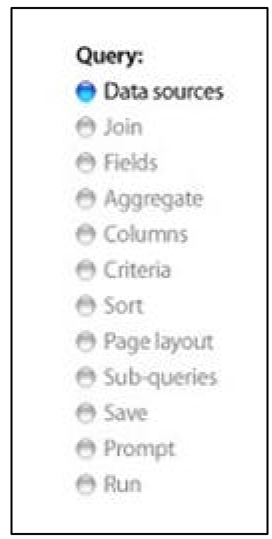


Figure 38: Query Wizard Steps

After you have entered the Query Wizard, you must walk through the steps listed above to create the query definition. Let's say for example, you want to show Critical Decision information for all active projects showing site names instead of codes. The following steps are used to create such a Critical Decision query. This query will serve as an example for using the Query Wizard for creating other queries.

Create a New Query Example: A Query for Project Critical Decision Information
The very first step of query creation is to visualize how you want your data to look in the query that you are creating. Most often, when the query is calling upon several projects, the data is organized by Project ID. In this example, we want each project to be organized by Project ID as well as by Site Name. The information that you want displayed affects how you will set up your query. In this example, we want to display all Critical Decision information for the projects. The first step is complete with the visualization of the query organized by Project ID and Site Name,

with each individual project having its Critical Decision information listed below its identifying information.

Data Sources

From here, the actual query creation begins at the "Data Sources" step of the Query Wizard, where you select the tables that you would like to include in your query. These tables are basically how the data in the query is organized. You may want to refer to the table in the Data Model section listing descriptions of each table in PARS 3.0. After selecting one or more tables from the list (hold down the control key to select more than one table), you may refresh the page or advance to the next step of the Query Wizard. For this query, we will select both the Project ID table and the Site Lookup table.

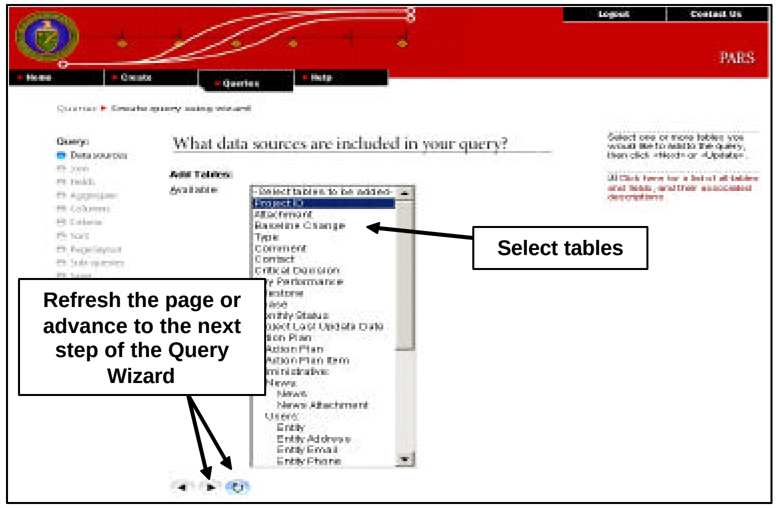


Figure 39: Data Sources

The Site Lookup table allows you to display the actual Site Name as opposed to only the Site Code, because this table includes the field for Site Name. For example, "Richland" will be shown as opposed to "RL." When only one table is selected in this "Data Sources" step, you will skip over the Join step of the Query Wizard since there are no tables to join together. However, because we selected both tables in this example, the next step is to advance to the join step of the Query Wizard.

Join

On this page, we select the tables to be joined together as well as the fields that uniquely tie (join) the records from one table to another. The first table is basically the primary table, often the one with the most fields to be displayed. The second table is the secondary table, in this case, the Site table. These tables must first be chosen from the pick list before actually joining the tables. Then click on the update or advance button to move on. After the joined tables are selected, the boxes below that determine which records are selected must be checked. Most often, the

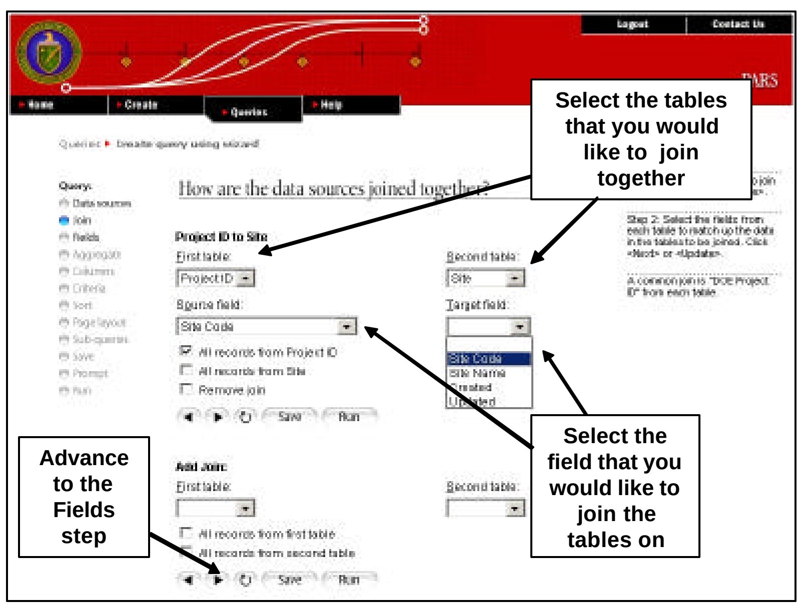


Figure 40: Joining Tables

box should be checked next to the label for all records from the primary (first) table. In this case, because we need all records from the Project ID table to be shown, we check that corresponding box by clicking on it.

Next, from the new pick lists displayed, the fields that are selected must match between both tables (Source field must be the same as Target field). This step allows the system to know how to link the information from each of the tables together. In this query, we will be joining the Project ID table with the Site table using the Site Code field. Basically, in this step we are telling the system that we want information from the Site table to be aligned with each Project ID listing based on the Site Code. After joining the tables, you will advance to the Fields step of the Query Wizard.

<u>Fields</u>

From the Fields page, select the fields that you would like to include in your query. You may select more than one field at a time by holding down the control or shift keys on your keyboard. In this example, we select the identifying information from the Project ID table fields such as ID, Name, Managing Office Code, and Project Status.

Be sure to select fields from all tables that you have selected for the query.

After selecting the appropriate fields from the list, you may refresh the page or advance to the next step of the Query Wizard.

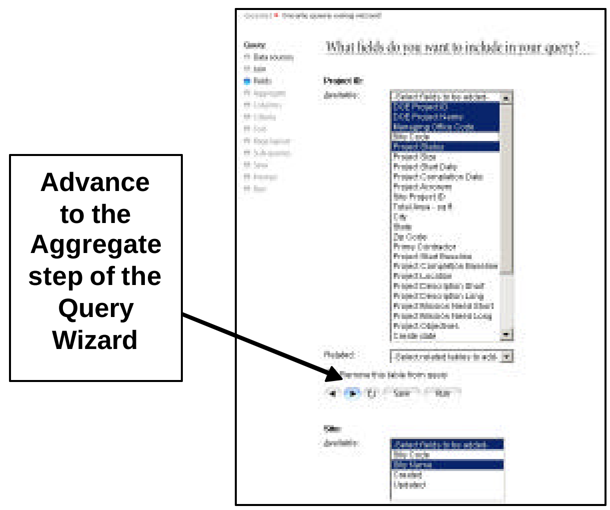


Figure 41: Page Advance

<u>Aggregate</u>

The Aggregate step of the Query Wizard allows you to use aggregate functions such as maximum, minimum, count, sum, etc. This can be used when there are multiple entries for one field, and the idea is to get a generalized picture of the data. For example, you could want to display all of the funding information for all of your projects, but there are more TEC entries for a particular year than you want to show. If you just want a general idea of TEC for that year, you could select Aggregate data for that field so that perhaps you get an average TEC for that year instead.

In this step of the Query Wizard, if one field is used with Aggregate data, then all fields must have Aggregate information entered in the Wizard. So, for example, you only want the TEC field to show aggregate data, you must click on "Group By" for all other fields in the query. This functionality is not needed for this Critical Decision query so we can simply pass over this step. To move on, either click on the Columns step in the Query wizard or click on the advance button on the bottom of the screen.

<u>Columns</u>

After advancing to the Columns step of the Query Wizard, you will be able to customize the columns in your query. From this page, you are able to select the position of the fields that will be displayed in your report (from left to right); you will be able to make certain fields invisible (they will not appear in your query); and create any new calculated fields. Making fields invisible by unchecking the box by the "visible" label, is used when you would like to filter a specific field, but not necessarily display the field in your query. Order the fields to be displayed by changing the number in the pick list next to the "position" label. This will alter the position of that field (from left to right) in your query. If you wish to make new calculable fields, type in the function that you intend to be calculated in the "formula" section.

When you are pleased with the column layout, you may advance to the Criteria step of the Query Wizard.

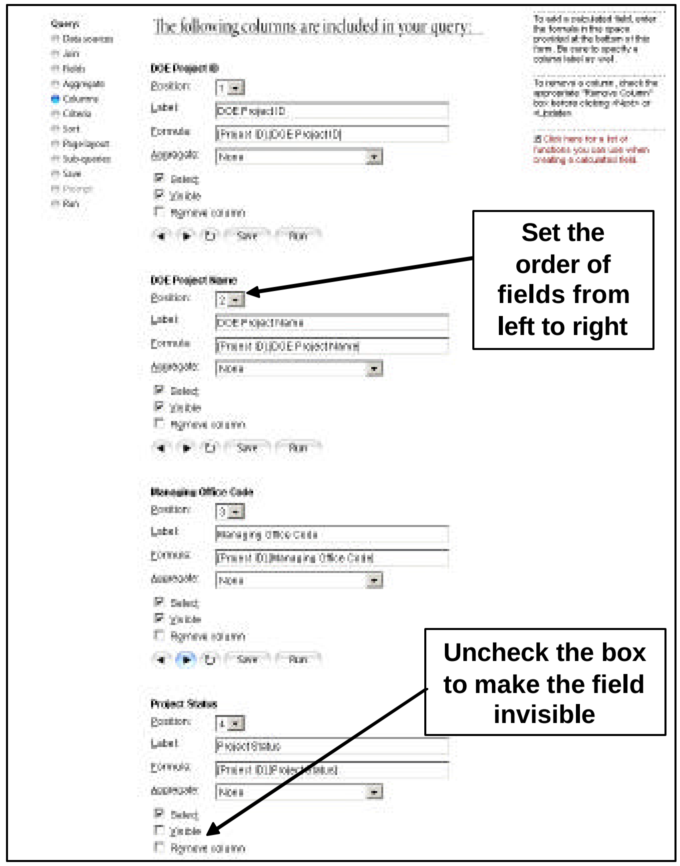


Figure 42: Set Column Order

Criteria

From the Criteria step of the Query Wizard, you can set the criteria with which you would like to apply to filter your query. Technically, you can select certain criteria from each field, but usually criteria are only set for a couple of fields. For this example, we want Critical Decision data only from projects with an Active status. To set the query to filter for only Active projects, you must type "Active" next to the Project Status field box on the Criteria page.

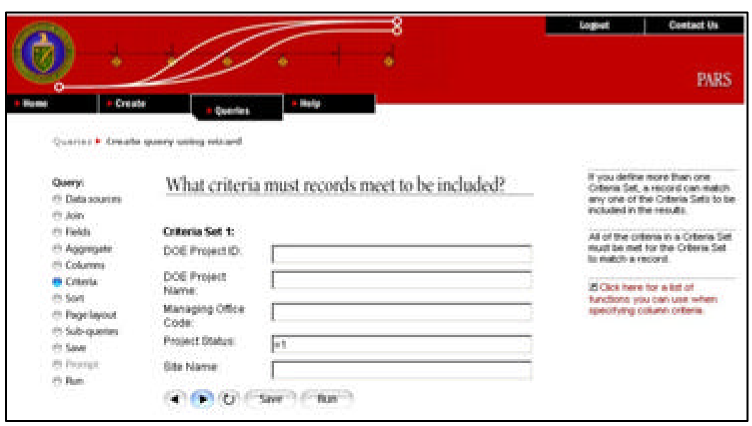


Figure 43: Set Query Criteria

When specifying particular ranges or data types to be included in the query, some fields are very particular in their recognition of formats. Usually, criteria are entered with an operator before the critical value. An operator is a function key that specifies a particular action to be used when calculating a certain field in the PARS system. Some quick operator keys are listed in the Help menu bar under Supported Functions, while others must be remembered. For example, if data to be included must be greater than or equal to a certain amount, then >= should be typed in as the "operator" followed by that value. When specifying a numerical value in the criteria step, the value simply needs to be typed in, with no formatting or units, as in entering data. However, textual or character data as well as date datatypes that are used in the criteria step should be entered with quotations on either side, as in our "Active" example.

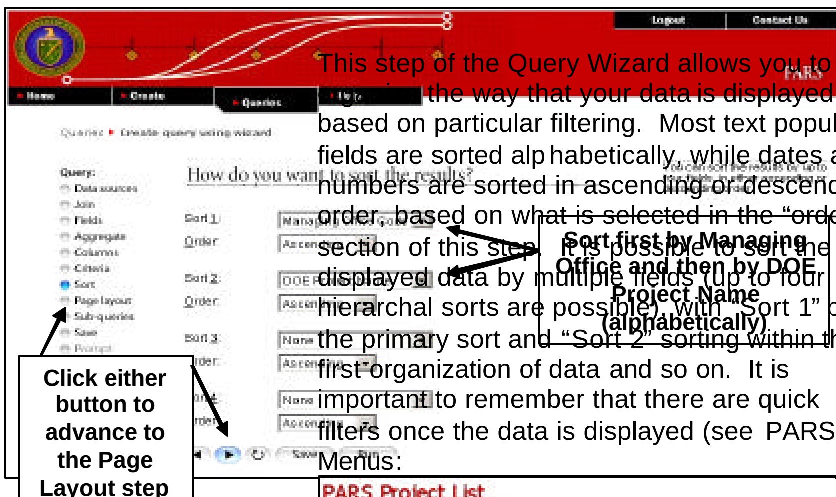
An operator can be mathematical (like many in the Supported Functions list), textual (words such as LIKE, NOT, OR, AND), and functional. Keep in mind that when OR is used between two specified criteria, the system will query for data matching one criteria or the other. OR is a good operator when trying to select for the inclusion of two types of data. The operator AND indicates that the data must match both criteria listed on either side of the operator in that field.

When attempting to query projects with information from a field that was originally selected from a table displaying codes (rather than the full word for the field) the associated codes must be used instead of the actual value or term when specifying the criteria. For example, if we wanted to select only for projects under the Managing Office: Science, we would have to type "SC" as the Managing Office Code, rather than the word "Science". This is because the table that we selected – Project ID – only has the field for Managing Office Code, not Managing Office lookup.

Click on Sort in the Query Wizard or on the advance button to advance to the Sort step of the Query Wizard.

Sort

This step of the Query Wizard allows you to [...] the way that your data is displayed based on particular filtering. Most text populate[d] fields are sorted alphabetically, while dates and numbers are sorted in ascending or descending order, based on what is selected in the "order" section of this step. It is possible to sort the displayed data by multiple fields (up to four hierarchal sorts are possible), with "Sort 1" bein[g] the primary sort and "Sort 2" sorting within that first organization of data and so on. It is important to remember that there are quick filters once the data is displayed (see PARS Menus: Column Menu and Field Menu), but these are not saved permanently into the query. If you want your data permanently sorted, then the sort must be entered in the Sort step of the Query Wizard. Once you are finished sorting your query, click on the advance button to continue.



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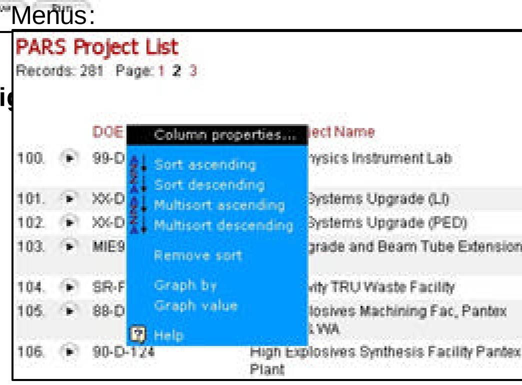


Figure 15: Column Menu

Page Layout

The Page Layout step enables you to organize the general layout and color schema for your query. We will simply use the default values for this example. Often, it is helpful to display a long list of projects on one page, rather than clicking on multiple pages to scroll through the list. Such page layout changes can be made during this step, simply by increasing the number of rows per page, or by limiting the output. You can click on the Subquery step to advance to the next step of the Query Wizard.

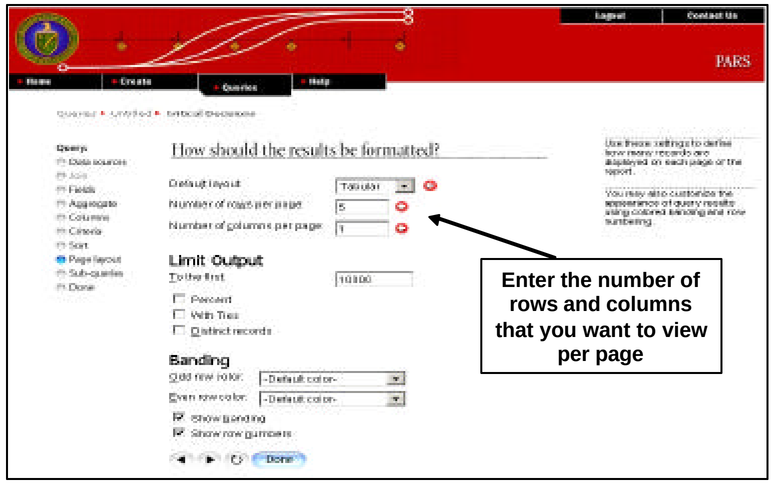
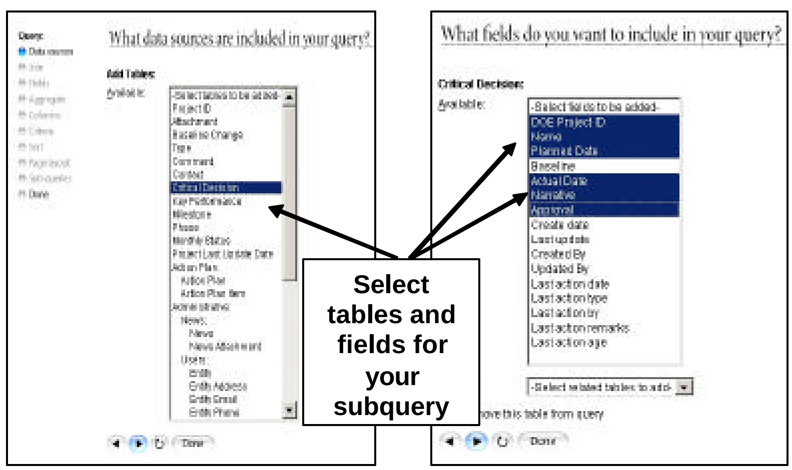


Figure 43: Query Page Layout

Sub-queries

You can create as many sub-queries as are necessary to satisfactorily present your project data. This section is necessary for our example. Since we want to show Critical Decision data for each project, we need to have a subquery. Basically, sub-queries make sub-tables under the main query heading (in our case, Project ID information). Simply enter a name for your subquery and click <Create Subquery>. In our example we will type Critical Decisions as the subquery name.



After selecting <Create Subquery>, you will come to a recursive Query Wizard. This wizard contains the exact steps as the original Query Wizard except that the Save and Run steps are replaced with “Done” (which is used when you are finished creating your subquery). You will now be able to select the tables and fields in Data sources that you would like to include in your subquery using the same process as above. In this case, we select the Critical Decision table and several fields in that table.

You can now advance to the Page Layout step of the Query Wizard to customize the look of the subquery. After you have set the Page Layout to your liking, you may click on the <Done> button to complete the subquery definition. You will return to the original Query Wizard where you will be prompted to join the subquery to the query using a unique matching field (typically the DOE Project ID). This join acts exactly like the query Join, in that it links all information together.

Figure 44: Join Subquery to Main Query

Prompt

This feature is new to the PARS version 3.0 query wizard. The prompt step of the query wizard is similar to the criteria step in that it specifies a subset of data to query. However, the prompt allows for future data retrieval processes to be tailored to the needs of the user at that particular time. For example, let's say you wanted to run the critical decision query that we designated as our previous example, but today you wanted projects with NNSA as the Managing Office and tomorrow you know you will need the same query but for projects managed by Science. The flexible and efficient way to design it would be to add a prompt.

Adding a prompt is relatively simple. Once you have designed your overall query, as above, you will advance to the Prompt step.

As in the Criteria step, you will see a list of all of your selected fields that may be broken into criteria. This part of the prompt step allows you to choose whether you want criteria for your query this time through, and for future use. If you want to select criteria for this particular query you choose an operator from the picklist and then type in your specific value that corresponds to the particular criteria (as you would in the

Figure 45: Add Query Prompt

criteria step). In order to place a prompt on a specific field, check the box that corresponds to the table that you want to prompt for. You may prompt for more than one field as well.

In our example, we want to select the operator "=" and type in NNSA in the value field for the Managing Office Code. And because we know that we will be using different Managing Office criteria next time (tomorrow) for the same type of query, we will also check the prompt box to the far right of the Managing Office Code value field.

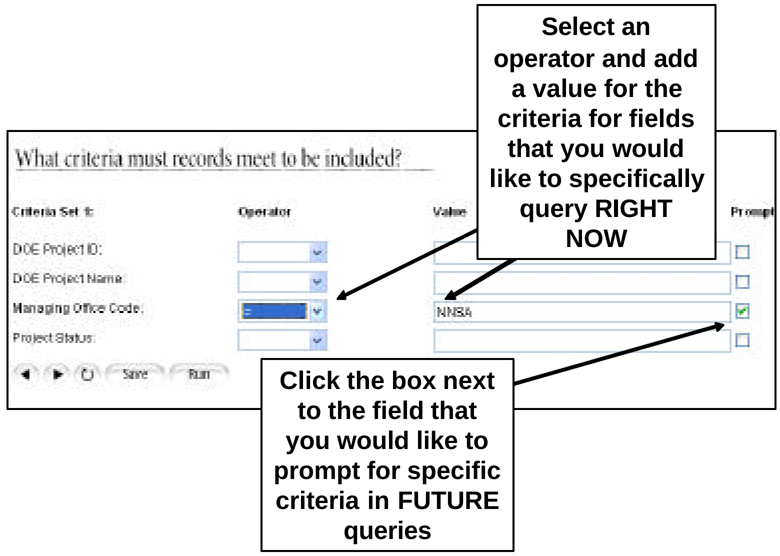


Figure 46: Setting Prompt Criteria

You may leave the Operator and Value fields blank if you do not want to include criteria in your current query. If you do not check the prompt box, however, there will be no prompt attached to this query and the query will have to be modified in order to add criteria or to add a recurring prompt for criteria. When a box is checked, every time that the query is used, a prompt pop-up will display and allow you to choose criteria for that particular query. The fact that the query will not run before asking for criteria is what makes this querying technique so efficient at displaying only pertinent data.

Once you have added a time-saving prompt to your query, you may move on by clicking <Run> or by advancing the page. If you are not happy with the results of your query, you may go back through any of the previous steps and change your selections to make the query more appropriate to your needs.

Save

If you are happy with your results, click on the title of the query (currently “Adhoc”) to pull up the ***Query Menu*** and select *Save*.

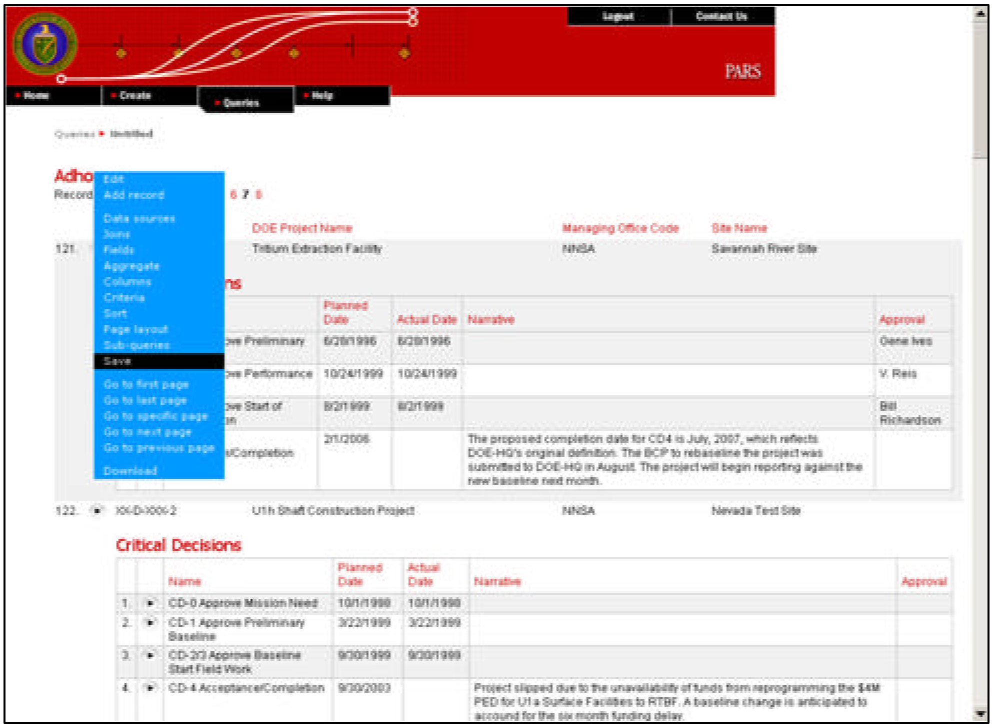


Figure 47: Saving Query From Query Menu

From the Save screen, give the query a name (and folder if desired) and share the query with any users or groups that might want to run the query. Click on the <Save> button to save the query in your “My Queries” folder.

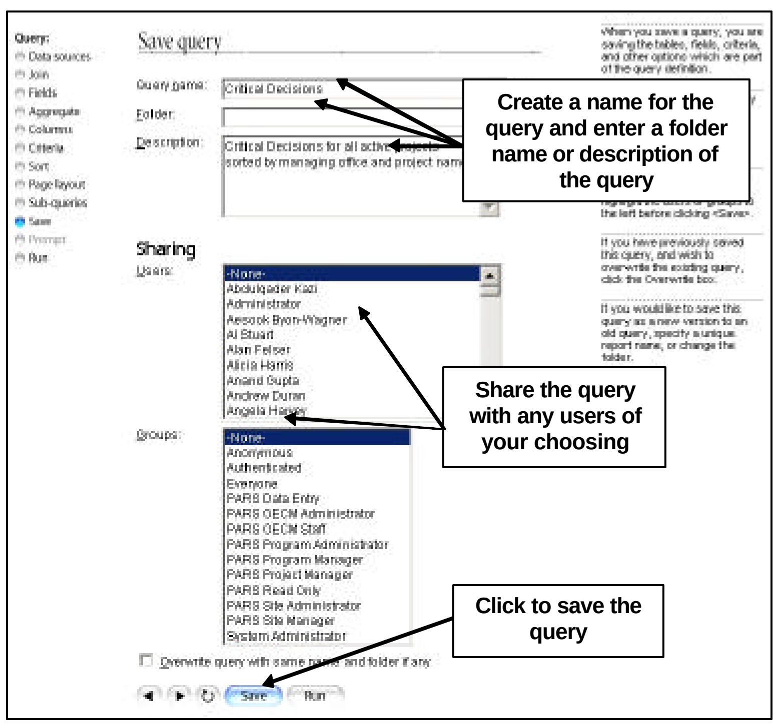


Figure 48: Save Query

Report Options From the View Query Page

Quick Sorting

All data, including query results, can be sorted according to fields the user has selected. This function is especially useful when the query is likely to return many projects and you want the projects to appear in a certain order. Quick Sorting is separate from the query wizard definition where you specify the sort order and save it with the query.

Click on the heading of the variable you wish to sort to pull up the ***Column Menu***. You may then choose from the following options: Sort (ascending or descending), Multisort (ascending or descending), or graph.

- Sort (ascending or descending) – Choosing sort will display the records in ascending or descending order;
- Multisort (ascending or descending) – Multisort allows you to sort by more than one variable. This is done by first clicking the primary variable and selecting "multisort," and then clicking the secondary variable and selecting "multisort." When this option is chosen, an arrow and number will appear next to the variable name indicating the order and direction of the sort;

Graph ("graph by" or "graph value") – You may create a graphic of the data returned by the query. Details of this function are described in the

- Graphing section.

Quick Filters

Query results may also be filtered to return projects that match your criteria by way of a "quick filter." This filtering is separate from the query wizard definition where you specify the criteria and save it with your query.

A quick filter is applied by clicking on the value to be used as the filter criteria. You can then select one of the following from the ***Field Menu***:

- Equal to;
- Not Equal to;
- Greater Than;
- Greater Than or Equal to;
- Less Than; or
- Less Than or Equal to.

Selecting a quick filter will "re-run" the query and return all the records that meet the specified criteria. You may remove a filter by clicking the name of the filter (its variable name) and then clicking <Yes> when prompted to remove the filter.

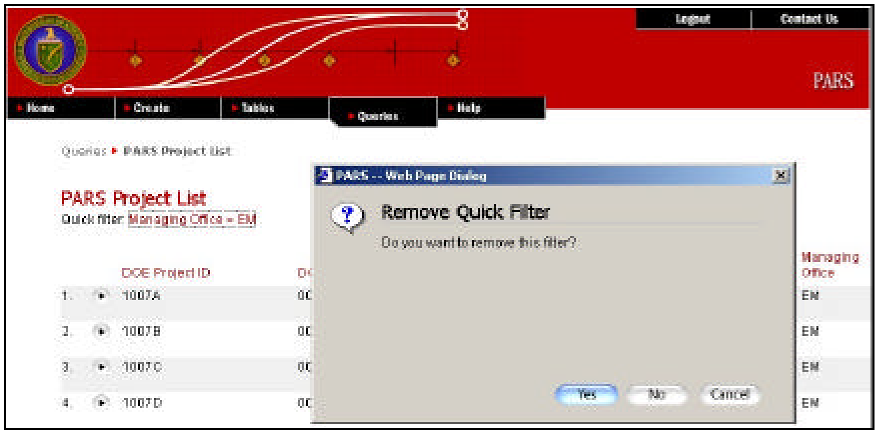


Figure 49: Remove Quick Filter

Graphing

After generating the list of query results, you can graph the results by using the ***Column Menu***.

Click the variable's name that you would like to graph and select *Graph by* or *Graph value*.

- Graph By – This defines the variable to graph by. This will be the variable that will appear on the X-axis in a typical X-Y graph.
- Graph Value – This defines which variables contain the numeric data that will be graphed. This will be the variable that will appear on the Y-axis in a typical X-Y graph. You may select more than one value to graph.

After you define both an X (graph by) and Y (graph value) variable, a graphic will be automatically generated and displayed.

If you are using Windows NT or Windows 2000 operating systems, you will need administrator privileges for your PC to load Chart FX, a self-loading graphics plug-in. This plug-in only needs to be installed once, not every time you generate a graph. If you do not have administrator privileges to load the software on your PC, call your local computer support help desk and request their assistance. If you do not have this software, no graphics will be displayed.

Chart FX provides you with the ability to manipulate the generated graph in a number of different ways within your browser. After generating a graph, you can access a menu of options by right

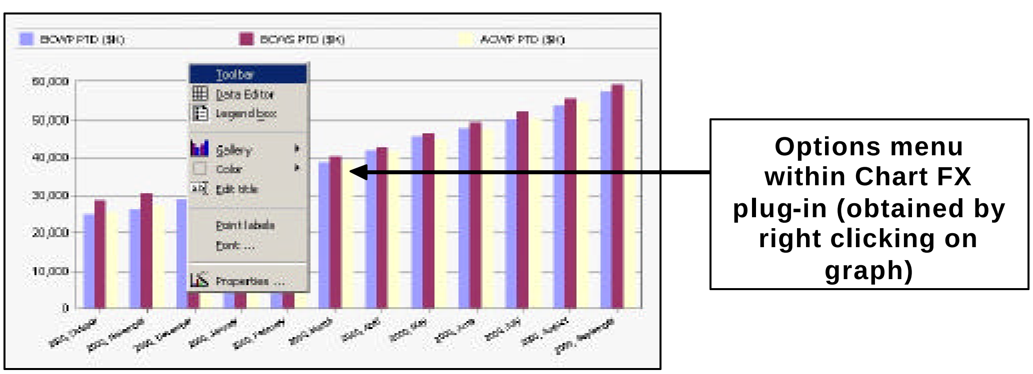


Figure 50: ChartFX Menu

clicking on the graph.

These options include:

- Toolbar – Places a tool bar on the graph that provides short cuts to several options as well as giving access to additional features.
- Data Editor – Provides a data table that can be edited to adjust your graph without tampering with the data in the PARS database.
- Data Legend – Allows you to add or remove the legend from the graph.
- Gallery – Allows you to change the type of graph (for example, bar graph to pie chart etc.)
- Color – Allows you to change the color scheme of the graph.
- Edit Title – Allows you to add or edit a title for the graph.
- Point Labels – Adds data labels to the graph elements (values).
- Font – Allows you to change the font size and style.
- Properties – Provides an additional menu that includes information regarding data series information (if you are graphing more than one value), axis information, three dimensional graphing information and other general information.

The Chart FX plug-in contains a toolbar that provides short cuts to many options as well as several additional features. The toolbar can be selected from the main graphing menu (pictured above).

The most notable of these features is the ability to print graphs from PARS without printing a full report. It is also possible to save graphs to your drives; however, you are using Chart FX as a web browser plug-in and would need to purchase the software to manipulate the graphs outside of the web application.

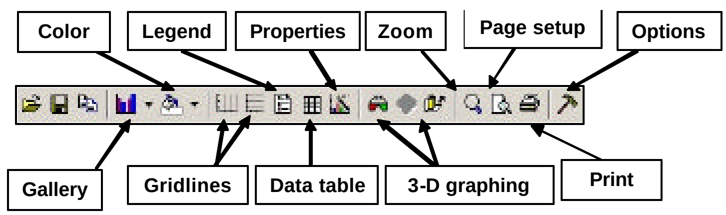


Figure 51: ChartFX Toolbar

There are several types of graphs that can be created using Chart FX. These include: column graphs, bar graphs, line graphs, pie charts, XY scatter plots, area graphs, doughnut graphs, radar graphs, and surface graphs. To change the graph type, right click on the graph and select *Gallery.* Click on the shape of the type of graph that you would like to display your data.

You may further manipulate the graphic using the sorting and grouping options described in the Quick Sorting section.

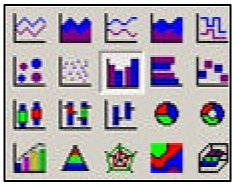


Figure 52: Graph Types

<u>Downloading</u>

Data can be downloaded from queries into Microsoft Word, Excel, Access or HTML formats. This feature permits you to use PARS data in other applications without reentering data. This feature can be used to create custom documents, tables, and graphics in other programs, or conduct further analysis in an Excel spreadsheet. You create a custom query containing the data to be downloaded and then execute the download command from the Query Menu. To do this, take the following steps:

1. Open the query (or create a new query) containing the data that you want to download. Be sure that all the fields you want to download are listed as column headings in your query.
2. Click on the title of your query to invoke the ***Query Menu*** and select *Download*.
3. Choose the program that you would like to download the data into using the dropdown menu.
4. Select the download range; All, Records, or Pages.

   - All - Downloads all results return from the query;
   - Records - Allows you to select specific records to download; or
   - Pages - Allows you to select specific pages to download.

   Click <OK> to begin the downloading process.

<u>Printing</u>

Standard Reports, Shared Reports, Custom Reports, graphs and any other reports in your "My Reports" folder can be printed directly from your browser.

1. Make sure that the desired report is visible in the active window.
2. Click the <Print> button on your browser.

If necessary, follow the instructions on the print pull-down menu, located under the <File> button in your browser.

To print your full project record, it is recommended that you use the My Projects Detail query. This query has been customized to print all essential project data in landscape format. For information about how to customize this query, please refer to the Modify a Query section.

Rights and Permissions

Rights and permissions are specifically designed to maintain data integrity standards at the highest possible level. In order to accomplish this objective, PARS has implemented a system of user rights to prevent you from making inadvertent and unauthorized changes to the database.

Overview

The database is only as good as the quality of the underlying data. To ensure that high quality standards are maintained, PARS is designed with a dual entry/review process. Here's how it works: if you are responsible for entering the initial data, you must save your changes and then forward the changes to your Project Director for final review and acceptance in the database. Generally speaking, the person responsible for entering data should not commit the data to the database. By enforcing this data entry and review cycle in the work process, fewer errors will be made.

In addition, rights and permissions are designed around the fundamental principle of ownership. The authority to accept data is generally given to those individuals directly responsible for their projects. In other words, if you are the Project Director for a project, then you "own" the data related to your project. Other Project Directors cannot accept data for your project. The only exception would be your superiors. They may be granted rights over your project in their role as a Program Manager or an Administrator. Under normal circumstances, however, you exercise control over your data through the periodic data entry/review cycle.

Groups

You are assigned certain user rights and permissions to perform read, write, and accept actions in PARS. These privileges are granted by associating you with a group profile. The administrator who creates your user account assigns you to a specific group. Through this association, you inherit the privileges of that group. Presently, there are nine groups (in order of graduated privileges): Read Only, Data Entry, Project Manager, Program Manger, Site Manger, Site Administrator, Program Administrator, OECM Staff, and OECM Administrator.

Before you review group permissions, it is worthwhile to understand some common database tasks and terminology. There are five actions that you may routinely execute as you interact with the PARS database. They include: SELECT, INSERT, UPDATE, DELETE, and ACCEPT. At the most basic level, you may belong to a group that enables you to execute these actions for an individual field (data element) or record (collection of fields comprising a project). When you use PARS, you will be granted rights or permissions to execute some combination of these five actions in accordance with your group profile. SELECT refers to reading or viewing the data. INSERT refers to entering or creating a new record that may or may not be an entirely new project. UPDATE refers to changing or editing existing data by overwriting it with new data. DELETE refers to erasing data from the database. ACCEPT is the process whereby any combination of pending data changes (e.g. pending INSERT, UPDATE, and DELETE edits) are committed to the database for all to see. In this help manual, we often use the synonymous terms enter or create (for INSERT), edit (for UPDATE), and read (for SELECT).

The sections that follow describe the basic rights and permissions of the selected groups.

<u>Read Only</u>

The Read Only group is restricted to viewing data, designing, and running queries. As a member of the Read Only group you can only invoke the ***Record Menu*** or run (and design) a query.

When you invoke the ***Record Menu***, the *Edit* and *Delete* selections will not appear. Read Only is designed for those users who do not have a responsibility to maintain the data, but have a need to run queries.

Data Entry

As a member of the Data Entry group, you can enter data (but not accept), edit (but not accept), and mark for deletion all project data. When you invoke the ***Record Menu***, there will be *Edit* and *Delete* selections available to choose from. Although you appear to be making changes online during the data entry process, your changes are not actually committed to the database until a user with greater privileges (your Project Director or supervisor) accepts your changes.

To facilitate the review and acceptance process, you should send the changes to the appropriate user with comments by selecting *Send* from the ***Record Menu***. See the section on Saving and Accepting data for more information.

Project Manager

As a member of the Project Manager group, you can enter, edit, and delete any project data that you are associated with. In addition to the rights associated with the Data Entry group, you can accept changes to those projects that you are specifically listed on the Contact(s) List as the Project Director. The email address under Project Contact(s) must exactly match your logon email account for your accept privileges to work. You can confirm this by finding the individual project from a custom query or the PARS Project List on your Start Page and then viewing the full project record and checking to see that your email is listed as the DOE Project Director in Contact(s).

When you invoke the ***Record Menu***, there will be *Edit* and *Delete* selections available to choose from. You may also have an *Accept changes* selection near the bottom of the ***Record Menu***. By clicking on *Accept changes* you are committing all changes to the database for all to see. Please make sure that you have reviewed all changes before clicking on *Accept changes*. Otherwise, you will have to go through another round of edits to change any errors.

Alternately, you may have a record in your Inbox with comments to review any changes posted by a Data Entry user on your project. First click on the inbox item(s) to view your inbox contents. Then when you invoke the ***Record Menu***, there will be *Edit, Delete*, and *Accept changes* selections available to choose from.

Program Manager

As a member of the Program Manager group, you can enter, edit, and delete any project data that you are associated with. In addition to the rights associated with the Data Entry group, you can accept changes to those projects that you are specifically listed on the Contact(s) List as the Program Manager. The email address under Project Contact(s) must exactly match your logon email account for your accept privileges to work. You can confirm this by finding the individual project from a custom query or the PARS Project List on your Start Page and then viewing the full project record and checking to see that your email is listed as the Program Manager in Contact(s).

When you invoke the ***Record Menu***, there will be *Edit* and *Delete* selections available to choose from. You may also have an *Accept changes* selection near the bottom of the record menu. By clicking on *Accept changes* you are committing all changes to the database for all to see. Please make sure that you have reviewed all changes before clicking on *Accept changes*. Otherwise, you will have to go through another round of edits to change any errors.

Site Manager

As a member of the Site Manager group, you can enter, edit, delete and accept all project data that you are affiliated with according to the specific sites and managing program office identified in your user profile. Your user profile is created for you when your PARS account is established. Your privileges extend beyond the rights associated with the Data Entry group and the Project and Program Manager groups. You can enter, edit, delete, and accept data for all projects that match both your site AND your managing program office affiliation(s). For example, as a member of the Oakland Operations Office and the Science Program Office, you may be affiliated with Lawrence Livermore National Laboratory, Stanford Linear Accelerator Center, and Lawrence Berkeley National Laboratory. In this case, as a Site Manager, you will have rights and permissions over all science projects executed at these three sites. If, however, there are NNSA projects located at Lawrence Livermore National Laboratory, you would not have privileges to accept changes to any NNSA projects.

You will also have a responsibility to maintain the Project Contact(s) information, keeping it up to date. As described in the preceding sections, Project Directors and Program Managers cannot accept data on their projects until their name and email is entered as the current contact (respectively) for each project they are associated with. If Project Directors and Program Managers are reassigned, then the Project Contact(s) information must be updated to reflect these changes. Users with Administration privileges can freely accept changes to Project Directors and Program Managers on the Project Contact(s) list. Until you update the list, any Project Directors or Program Managers newly assigned to projects will not be able to accept data on their projects. Therefore, it is important that you keep the PARS database up to date with all Project Director and Program Manager personnel changes.

Site Administrator

As a member of the Site Administrator group, you can enter, edit, delete and accept all project data that you are affiliated with according to the specific sites identified in your user profile. Your user profile is created for you when your PARS account is established. Your privileges extend beyond the rights associated with the Data Entry group, the Project and Program Manager groups, and the Site Manager group. You can enter, edit, delete, and accept data for all projects that match your site affiliation(s). For example, as a member of the Oakland Operations Office, you may be affiliated with Lawrence Livermore National Laboratory, Stanford Linear Accelerator Center, and Lawrence Berkeley National Laboratory. In this case, as a Site Administrator, you will have rights and permissions over all projects executed at these three sites.

You will also have a responsibility to maintain the Project Contact(s) information up to date. As described in the preceding sections, Project Directors and Program Managers cannot accept data on their projects until their name and email is entered as the current contact (respectively) for each project they are associated with. If Project Directors and Program Managers are reassigned, then the Project Contact(s) information must be updated to reflect these changes. Users with Administration privileges can freely accept changes to Project Directors and Program Managers on the Project Contact(s) list. Until you update the list, any Project Directors or Program Managers newly assigned to projects will not be able to accept data on their projects. Therefore, it is important that you keep the PARS database up to date with all Project Director and Program Manager personnel changes.

Program Administrator

As a member of the Program Administrator group, you can enter, edit, delete and accept all project data that you are affiliated with according to the managing programs identified in your user profile. Your user profile is created for you when your PARS account is established. Your privileges extend beyond the rights associated with the Data Entry group, the Project and Program Manager groups, and the Site Manager group. You can enter, edit, delete, and accept data for all projects that match your program affiliation(s). For example, if you are affiliated with the Science Program, you will have rights and permissions over all projects whose managing program is Science.

You will also have a responsibility to maintain the Project Contact(s) information up to date. As described in the preceding sections, Project Directors and Program Managers cannot accept data on their projects until their name and email is entered as the current contact (respectively) for each project they are associated with. If Project Directors and Program Managers are reassigned, then the Project Contact(s) information must be updated to reflect these changes. Users with Administration privileges can freely accept changes to Project Directors and Program Managers on the Project Contact(s) list. Until you update the list, any Project Directors or Program Managers newly assigned to projects will not be able to accept data on their projects. Therefore, it is important that you keep the PARS database up to date with all Project Director and Program Manager personnel changes.

<u>OECM Staff</u>

The OECM Staff has additional privileges to enter, edit, delete, and accept data in all the baseline fields. Under normal circumstances, all fields marked "baseline" (such as TPC Baseline and Project Completion Baseline) are initially populated whenever a critical decision (CD) 2 date is actualized. This occurs when an actual date is entered for a CD-1/2, CD-2, or CD-2/3 decision in the critical decision table. Once a baseline field is populated with data, it can only be edited by a member of the OECM Staff group. If you notice an error in a baseline field or have recently received a baseline change approval, contact the OECM Staff Representative to coordinate the changes.

<u>OECM Administrator</u>

The OECM Administrator has additional privileges to: (1) create and edit news announcements that appear on the Start Page, and (2) grant access by creating new users and assigning them to administrator groups. During the normal course of operation, however, user names, passwords, and their applicable rights will be assigned and distributed by the various administrators (Site Manager, Site Administrators, and Program Administrators). Please refer to the section on PARS Administration to learn how to activate your account. Do not forward your request for a new account to the OECM Representative.

Help

PARS has a detailed help system containing information about how to become productive and proficient with the application.

Helpful Hints

PARS 3.0 now also contains "Helpful Hints" on most pages that you can navigate. Helpful Hints are located on the right side of the screen and describe the functionality available on that specific screen. Helpful Hints also provide you with direction as you navigate from screen to screen.

Help Menu

The ***Help Menu*** on the navigation bar is the central location where you can find information regarding how to use the application. This menu will provide a list of options that offer comprehensive tools to solve most any problem or issue that you might face.

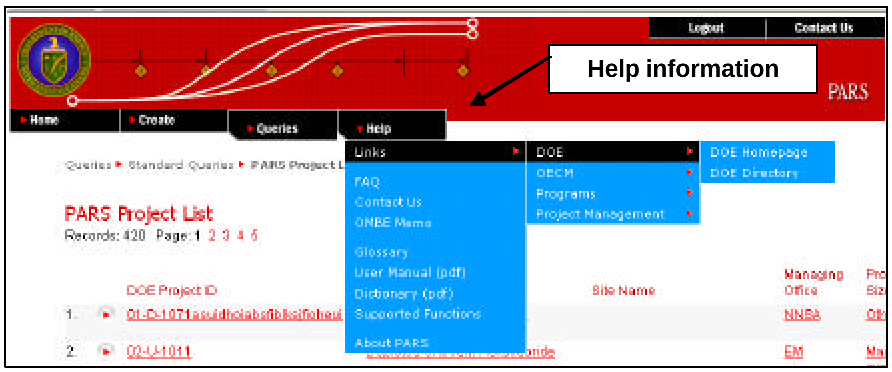


Figure 53: Help Menu

<u>Links</u>

The ***Help Menu*** provides you with a list of pertinent links related to PARS, DOE, OECM, individual programs, and project management. By selecting any of these links, the corresponding URL will open in a new window. This action will not log you out of PARS.

<u>FAQs</u>

Frequently Asked Questions (FAQs) are a set of commonly asked questions about the functionality of PARS. The objective of these questions is to explain some of the complexities of PARS in a simple and concise manner. The FAQs section will be updated often as new questions arise. If you have any questions regarding the PARS system, feel free to e-mail or call the PARS Help Desk. Contact information can be found in the Contact Us section. FAQs can be accessed by placing your mouse over the ***Help Menu*** and selecting *FAQ*.

<u>Contact Us</u>

In order to maximize the effectiveness of PARS, your feedback is important. Your suggestions and comments will help us improve the reporting system for the benefit of the entire PARS community.

Please first refer to the extensive documentation in the Help Menu as primary support resources. However, PARS support can be contacted for any questions and concerns regarding PARS. The

PARS support desk can be reached by telephone or email. This is a non-realtime support line, however, someone from the support line will respond to your request within 24 hours or one business day, whichever is greater.

PARS Help Desk
Project Performance Corporation
(703) 748-7022
parshelp@ppc.com

If you would like to contact a Technical Representative at the Office of Engineering and Construction Management (OECM), you may contact the individual below:

David Treacy
Department of Energy
ME-90
1000 Independence Ave., SW
Washington, DC 20585
david.treacy@hq.doe.gov

Getting Started

This document provides instructions in the form of a quick reference guide about how to start using PARS. Reading the *Getting Started* file is a great way to "jump start" your knowledge of PARS. It provides a quick overview of how to use the essential features of the system and will introduce you to the system without going into great detail. *Getting Started* can be accessed by placing your mouse over the ***Help Menu*** and selecting *Getting Started*.

OMBE Memo

This is the memorandum issued by Bruce Carnes on September 19, 2001 that provides the reporting requirements for all projects to be entered in PARS. It is available for download in a PDF format.

Data Model

This is a complete PARS Data Model. The Data Model provides a graphical representation of the table structure and hierarchy of the PARS database. It is a diagram of the structure of the database and it shows the relationships between tables. The Data Model is useful for getting an overall picture of the database and the content in specific tables. It is also helpful when designing your own custom queries. It is available to download in a PDF format.

Glossary

The glossary is a dynamic version of the data dictionary. You can use Quick Sort and Quick Filter in the same way as PARS Queries. See the Report Options From the View Query Page section for further information. This version of the glossary is only available online and cannot be printed. You cannot edit the criteria of this report.

User Manual
A copy of this user manual is available within the Help Menu to facilitate your use of PARS. It is a complete reference for the operating and navigating of PARS. This fully upgraded manual is helpful because it contains step-by-step examples to help you learn how to enter and report your data effectively.

Data Dictionary

This is a complete PARS *Dictionary*. The *Dictionary* is a document containing the definitions and sources for every table and field in the PARS database. It is organized by table, which allows you to quickly find the specific field for which you need a definition or explanation. The *Dictionary* is available in PDF format and can be printed.

Supported Functions

The *Supported Functions* section contains a list of SQL functions that can be used when designing a query. The *Supported Functions* can be sorted and filtered in the same way as PARS Queries. See the Report Options From the View Query Page section for further information.

About PARS

About PARS can be accessed by placing your mouse over the Help menu and selecting About *PARS*. This section provides brief purpose and background statements, the current release version, and links to the software development team.